User manual

BSC Designer

Balanced Scorecard Software

Version 8.2

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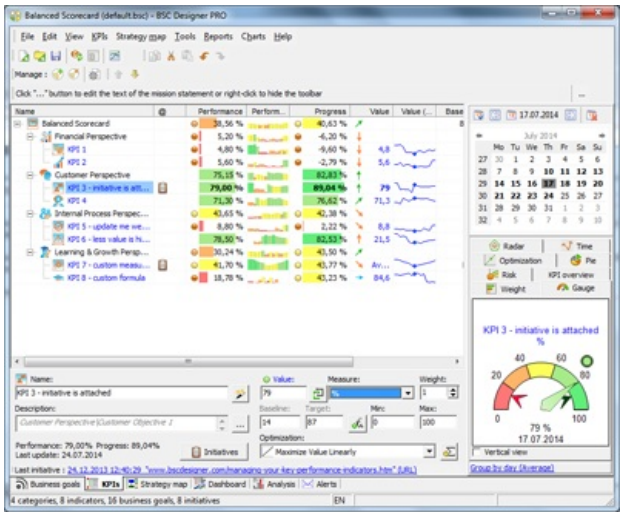
Welcome to BSC Designer!

Check out the video introduction to BSC Designer!

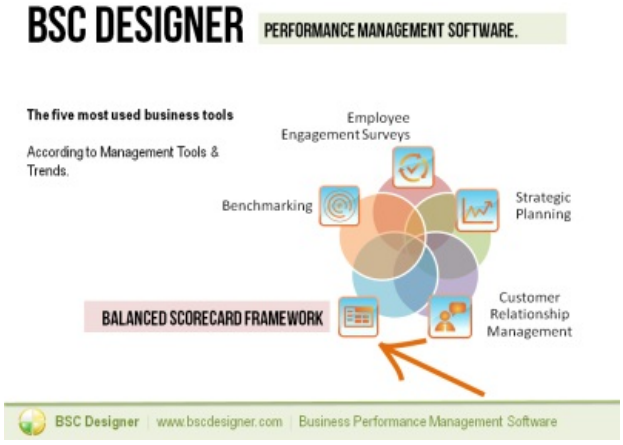
BSC Designer is a **performance management** software. It supports the Balanced Scorecard framework, which according to yearly studies continues to be one of the most popular tools for planning and executing a business strategy.



Using performance management tools like this can be an important way of keeping track on the progress of your business. It gives you vital information about what's happening now and it also provides the starting point for a system of target-setting that will help you implement your strategies for growth.

Knowing how the different areas of your business are performing is valuable information in its own right. But, a good measurement system will also let you examine the triggers for any changes in performance. This puts you in a better position to manage your performance proactively.

Executives all over the world use business or balanced scorecard frameworks to describe and execute their company's strategies.



For most people though, a word like "**scorecard**" is about managing KPIs, or Key Performance Indicators. And, we agree, as it's a must-have part of any business scorecard as it allows you to monitor the current business performance.

- On the other hand, KPIs only tell us the story about a company's past.

That's why we created BSC Designer. Because most business professionals want to manage their company better through strategic planning for future business objectives and initiatives, and sharing this vision with their team.

The goal with our performance management software is to let everyone in the company **see the big picture** of what's going on -- and how a specific initiative could help improve business performance -- including the jobs of everyone in the company.

Now, to describe this big picture, top managers and their teams need to create strategy maps. BSC Designer lets you do just that. With a new strategy map, you can capture business insights that you have, and convert them into business objectives linked with each other by cause-and-effect connections.

These business objectives will be aligned with specific indicators and initiatives giving everyone in the company a clear road map to business success.

That is a short version of our philosophy and about the business scorecards themselves. We implemented these ideas in our scorecard software, though, and we are communicating them via info-products, books, and articles here on bscdesigner.com.

Now, as you can see, a professional business scorecard will help you not only with planning, but with **execution** as well. We know that your biggest challenge with business scorecards is not only about KPIs. The major challenge you currently have is getting all the vital parts of the scorecard together, such as:

- formalizing interconnected **business objectives** on a strategy map,
- **aligning** them with specific KPIs, measurements, and action plans
- regularly **updating** and **maintaining** this business scorecard.

BSC Designer is an excellent choice for these tasks! It simplifies the complexities of your company in an easy to use and easy-to-understand way.

- But, don't just take out word for it.

Check out the testimonials of past and present users as well as proven case studies on bscdesigner.com. You'll find that our tools helped them and it can help you too.

This product is available for several platforms:

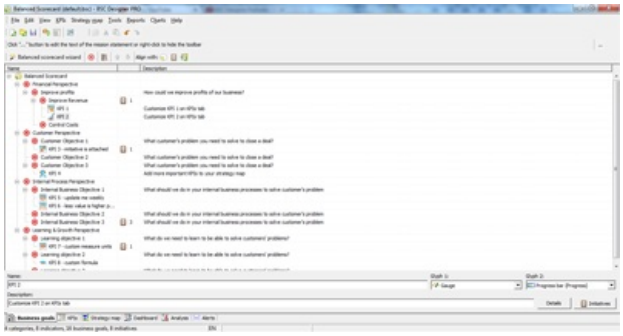
- you can use the **Windows desktop** version, or
- integrate it with BSC Designer **Online** for even better teamwork support
- with the **Android** application, you can have a live copy of your business scorecard and access it on your smart phone or tablet.

Lastly, if you need any assistance with your business scorecard project or our software, send us a message and we'll make sure to help you in any way.

Business Goals in BSC Designer

Check the video manual for Business Goals online.

Business executives always have many insights about their company. It is important to formalize these insights in the form of business goals and objectives. Unlike in the simple to-do list, in the business scorecard the cause-and-effect connections between objectives are important. BSC Designer allows formalizing business goals, aligning them with indicators or process maps, and presenting them on the strategy map.



All of the control for business goals in BSC Designer are located on the "Business goals" tab.

- The tool bar at the top allows adding new business goals and aligning indicators with them.
- The area in the middle displays all of the business goals of the scorecard project.
- The panel on the bottom is to specify and modify the properties of a business goal.

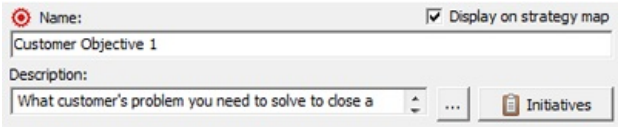
Goals and objectives in BSC Designer

By the way, sometimes the words "goal" and "objective" are used interchangeably. Actually, there is a difference. The word "goal" refers to some vague idea, or a "business dream," while "objective" is more specific and quantifiable. Any business professional knows that all excellent objectives start with vague goals, so in BSC Designer we don't obligate you to be specific. You can manage vague goals, as well as specific business objectives. To create and set up a new business goal follow these steps:

- Select a parent item for a new business goal and then click the "New business goal" button on the tool bar. A new goal item will be created.
- As you can see, you are not limited to just a **list** of business goals, you can create a **hierarchical** goals structure with many parent and child items.

Goal's properties

A business goal item in BSC Designer has some important properties:

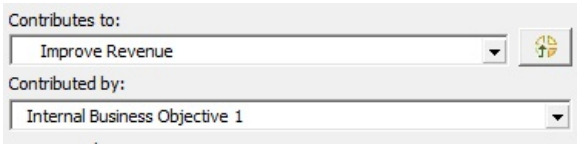


- The **Name** and the **Description** fields help to identify a goal and to add some more details about it.
- With an **Initiatives** button one can align a new initiative with a selected business goal. *Check the "Initiatives" section of the manual for more details about supported types of initiatives.*

- Use "**Strategy theme**" drop list to select a strategic theme for the business goal. BSC Designer will use a different color coding for the business goals associated with the different strategy themes.

Cause-and-effect connection

The **cause-and-effect connection** between business goals is important as it helps to answer the "Why?" and the "How?" questions of the strategy. BSC Designer allows managing and visualizing these connections.



- There are two properties of a business goal item in BSC Designer: "**Contributes to**" and "**Contributed by**." With these fields you can specify the cause-and-effect connection for a selected business goal.
- Next to the "**Contributes to**" drop list, there is a button "**Link to the external project**." Use it to show how the business goal from your scorecard contributes to the higher level goals.
- Some types of strategy maps, like for example a "Balanced Scorecard" strategy map, supports the visualization of these cause-and-effect connections in the form of arrow links.

Using "Contributes to" and "Contributed by" fields is one way to tell BSC Designer about the connection between business goals. It is also possible to create some new business goals and establish cause-and-effect connections between them **directly** onto the strategy map. *Check out the "Strategy map" section of the manual for the details.*

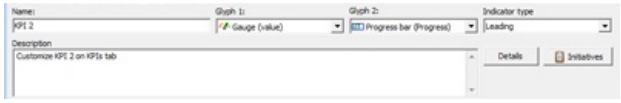
Goal on the strategy map

- Sometimes, a business goal that you have is important, but not "strategic" enough to put it on the strategy map. In this case you can have this business goal listed in BSC Designer, but you can choose not to display it on the strategy map. For this purpose, use "display on the strategy map" check box, which is available on the goal's properties panel.

Once a new business goal is created in BSC Designer there are two important things to do:

- Use the "**Initiatives**" button to align specific action plans and initiatives with this business goal.
- Use the "**Align with KPI**" button to link some indicators to this business goal.

Indicators that are aligned with business goals will be shown below the respective business goal item. You can select an aligned indicator and specify how you want it to be visualized on the strategy map.



Among visualization options there is "Indicator type" drop list. Use it to specify whether in this business context an aligned indicator is leading or lagging one:

- Leading indicators will be marked with a light green color on the strategy map,
- Lagging indicators will be marked with a light gray color on the strategy map,
- Indicators without a type specified will be marked with a white color.

For example:

- If a respective indicator of a business goal helps in monitoring the current business performance, then you might want to choose "Stoplight" and "Gauge" to be visualized on the strategy map.
- If the indicator helps in tracking the progress towards some target value, then you might want to have "Progress bar" and "Value chart" to visualize the indicator's state on the strategy.

Switch to the "Strategy map" tab to see how the business goals and aligned indicators are visualized.

- Some business goals are related to a specific process. In BSC Designer you can create a detailed process map using drawing functions provided by the "Strategy map" tab. After this, you can align the created process map with a specific business goal as you did it with an indicator.

Conclusion

In contrast from *project management* where we deal with the minor tasks and the distribution of specific resources, a business scorecard is about a company's **strategy**. You *don't need* to put into the scorecard all of the smallest tasks you have. The goal is to have a big picture of what's going on in your business, and to understand the reasons and the consequences better. The connected business goals, aligned indicators, and strategy maps will help you with this.

Specify Business Mission and Vision

In BSC Designer you can specify and display a short mission/vision statement.

Change mission/vision statements
To change the mission or vision statement follow these steps:

1. Go to the "Business Goals" tab.

2. Select the main root element (by default it is named "Balanced Scorecard")

3. Enter the text in the "Mission" field below or click "..." button to access more details.

Now, if you will switch to the "Strategy map" tab and update your "Balanced Scorecard" map, you'll see the mission statement on the top.

KPIs in BSC Designer

Video manual is available for KPIs in BSC Designer.

For most business professionals the word "scorecard" is strongly associated with Key Performance Indicators (KPIs). Strictly speaking, a typical **business** scorecard consists of two parts:

- The "**management**" part that includes business goals and strategy maps, and
- The "**measurement**" part that is supported by the indicators.

The "KPI" tab in BSC Designer is for the "**measurement**" part of the scorecard, there you will find:

- The indicators with their performance figures
- The panel to edit the settings of an indicator, and
- A number of visual charts and diagrams

The interface of "KPIs" incorporates many functions, including those ones that allow you to drill down to the data from other scorecard projects, calculate performance and progress for indicators and for the whole scorecard.

Create a new indicator

A KPI scorecard starts with an indicator. To create a new indicator click the "New indicator" button on the toolbar.

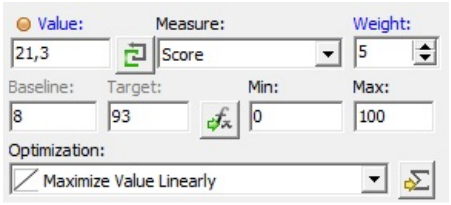
With BSC Designer it is easy to:

- Move indicator in the KPI tree,
- Change its name,
- Change an icon associated with it,
- Add a detailed description,
- Assign a person to be responsible,
- Specify a required update interval or
- Add a specific initiative.

The panel below allows adjusting an indicator's settings.

Value of an indicator

The **Value** field shows the current state of an indicator.



- The value of an indicator is time-specific. Choose a date in the calendar on the right to enter a new value or view an existing one.
- Most indicators are updated monthly or quarterly, go to the "Update interval" option in "Initiatives" to choose an appropriate update interval.

Next to the **value** field there is a "KPI Data Source" button. Use it to choose a data source for an indicator.

- The data can come from a database, it can be calculated, and it can be imported from MS Excel or from other scorecard project. There is a section of the manual that explains all of the supported data sources in the details.

Min, max, and performance

The pairs of the input fields "**Min** ... **Max**" and "**Baseline** ... **Target**" allow specifying the range of values for an indicator, so that the program can calculate the *performance* and the *progress* of an indicator respectively.

- The results of these calculations are displayed in the KPI tree.

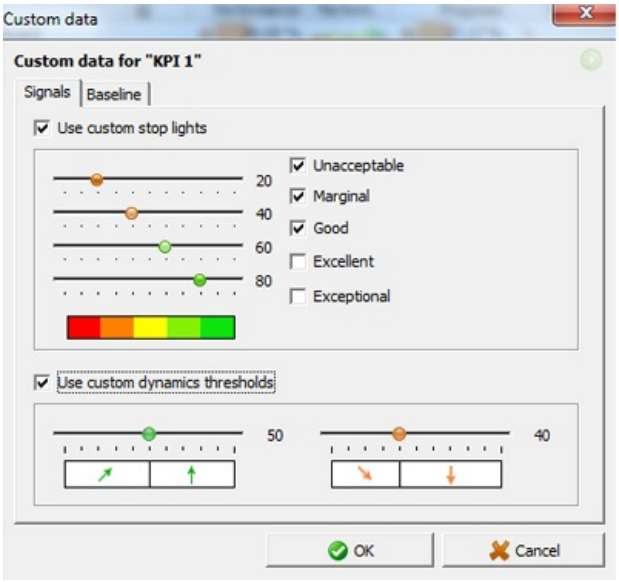
To illustrate the **difference** between these fields let's take the indicator "*Number of qualified leads* " as an example:

- What might be the **minimal** number of leads that a business generates weekly? Managers might have a bad week, when no leads were generated, so we put "0" in the "Min" field.
- What might be the **maximum** number of leads that a business generates weekly? It depends on the business, let's use 30 leads for this example.
- If the only goal of the manager is to **monitor** the current business performance, then we have enough data for the calculation. Taking into an account "Max," "Min," and "Value," BSC Designer calculates the *performance*. If business generates 12 leads per week then the performance is 40%.

Sometimes you might want to enter only the current value and compare it to the baseline and target. In this case use "**Simple mode**" check box.

Stop-lights

A small "**stop-light**" near the value field indicates the state of the indicator visually. Click on the stop-light icon to customize the thresholds for this indicator. For example, you can tell the program that 40% performance is actually a red zone for this very indicator.



Baseline, target, and progress

Using the "Max" and "Min" fields is fine for the *monitoring* purposes, but what if business executive has some strategy to increase the number of leads. In this case, he or she might need to track not the performance, but the ***progress***. To track the progress one needs to compare the current value to the starting point (baseline) and to the end point (target).

- The goal of an executive might be to start with 12 leads per week (baseline) and to achieve the level of 20 leads per week (target).

How does BSC Designer help in this case?

- Managers generate 12 leads per week. BSC Designer calculates that the performance is 40%, but the progress is 0%, as the number of leads did not improve yet.
- Managers of the company did an excellent job and improved the number of qualified leads from 12 to 18. What is the **performance** and the **progress** achieved? The performance is 60%, as we measure it on scale from 0 to 30; the progress is 75%, as we measure it on scale from 12 to 20 and we have almost achieved the target goal 20 lead per week.

Planning progress with Target Wizard

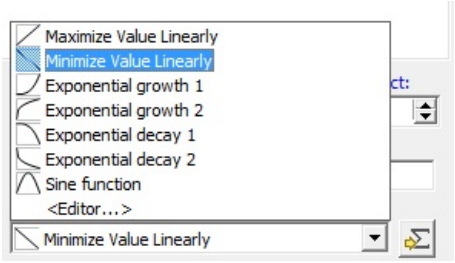
In the real business situations a manager doesn't expect a sudden growth of the number of leads. On the contrary, a slow growth along a 6 month period is expected. It means that the ultimate goal (20 leads per week) is actually distributed along the 6 month period. To reflect this simple idea on the scorecard, there is a "**Target wizard**" button next to the target field.

- Now, for each control point a manager will see if the indicator increases its value accordingly to the previously defined plan, and if some correction is needed.

You can learn the details about how BSC Designer calculates the score in " Scorecard and KPIs 101" article.

Optimization formula

What if indicator's value should be *decreasing* with the time? For example, a manager is measuring "Response Time" for a customer support, which should be minimized. In BSC Designer you need to choose "Minimize value linearly" in the "**Optimization**" drop list.



- You will see then, that with an *increase* of the value the performance drops, and with the *decrease* of the value it grows.

With an "Optimization" option it is possible to select more complex optimization functions that were discussed in a separate section of the manual.

Measure units

In the beginning we were talking about two indicators: *the number of leads* and the *respond time*. It would be much easier to understand what indicators are about if one could set "Leads" and "Hours" as a measure units. In BSC Designer there is a drop list "**Measure**" where you can choose one of the predefined measure units or add a new ones.

- In our case the measure units will be "Leads" and "Hours."
- It is also possible to use some generic measure units like "%" or "score."

Relevant importance

There is a "weight" field among indicator's properties. Some business executives find it especially helpful as it allows to specify the relevant importance of an indicator compared to the importance of another indicator.

For example:

- Let's create an indicator "Support quality" and put inside "Time to answer support queries" and "First contact resolution rate" indicators. Are these two indicators equally important for the "Support Quality" score? Common business sense tells us that it's better to give a good answer that will solve the problem than to just respond quickly with some useless answer. Still, we need to respond quickly enough, otherwise the good answer will come too late.
- The "**Weight**" field helps to explain this idea to the program. The weight of "Time to answer support queries" might be 3, while the weight of the "First contact resolution rate" might be 7. In this way we tell BSC Designer that these two indicators have different impact on the "Support Quality" score.

The maximum weight of all indicators on one level is defined in File > Document Properties > Main >

Max Weight. You can select the "Balance weights" command in the KPIs menu. BSC Designer will update the weights so that the sum of the weight would be equal to Max weight.

Containers for indicators

One important comment about the example above.

- The "Support quality" indicator that we created, was actually a **container** for two other indicators.

A container is similar to an indicator - it has the value and the performance. The difference is that the value of the container can be calculated using the values of child indicators.

- In the example with "Support Quality" it did not make sense summarizing two different measures - "hours" and "leads" to calculate the value of the container. For that very reason we calculated the performance of the container as a "weighted average" of a child's performance and used this performance for the container's value.
- If the container is something like "Sales in the region" and inside there are indicators for the revenue generated by local offices, then for the value of the container it is possible to use a sum or an average of the child' values. In this case, the performance of the "Sales in the region" container can be calculated as a weighted average of the child's performance, or if you have some specific performance criterion in mind, you can use container's value and other parameters such as baseline, target, min, and max to calculate the total performance.

Disable Indicator

All of the indicators on the scorecard are taken into account when BSC Designer calculates the performance. Sometimes we might need to have an indicator on the scorecard, but we don't want to take it in into account when calculating the performance of the project. In this case right-click on the indicator and choose "**Ignore in formulas**" option.

Conclusion

Needless to say that most options of the indicator are customizable:

- Stop-light colors and dynamics thresholds can be customized
- Columns of the KPI tree can be customized
- Even an indicator's icon can be customized!

KPI scorecard helps executives focusing on important performance figures. Certain visual means help in understanding the state of the indicators even better:

- Various charts show the current value, trend, and the performance of an indicator
- The indicators can be aligned with business goals and visualized on a strategy map or a dashboard
- A wide range of initiatives can be aligned with an indicator
- It is possible to assign a person responsible and required update interval
- Various reports help presenting indicators in a visually appealing way and share them with others

- With an account in BSC Designer Online you can always have copy of your KPI scorecard available online

From the "Testimonials" section of BSC Designer website you can learn that this product is recognized by many business professionals as a must-have tool for KPI scorecard. Most people start the scorecard project in a spreadsheets program. This is fine for a prototyping stage, but when the project grows and changes, spreadsheets are getting really hard to update and maintain. BSC Designer is a professional software for business scorecards, you can use it for a prototype stage, for a single scorecard projects, as well as for a complex business scorecards with many KPIs and cascading.

Managing Data for Certain Time Points

BSC Designer can work with time-specific indicators, instead of having fixed performance values for an entire period; users can define performance values specific to certain dates. While the name of an indicator is the same at any time point, such values as relative weight, min/max values, and score are time-dependent. Thus, users have more flexible control over performance.

Date toolbar

The date toolbar panel in the BSC Designer interface helps to manage time points.

- There are two navigation buttons which allow moving forwards and backwards between time points
- The calendar-like button between the navigation buttons is for accessing the calendar
- Two more commands on the date toolbar allow deleting date-specific information and navigating to the current date

Calendar

If the "Calendar" button in the toolbar is clicked, the program will open a special calendar which represents the available time points.

- If the specific date is highlighted in bold, then there is new information for the indicator
- The user can click any date in the calendar and assign date-specific information

Inheritance

The values of performance indicators are actually inherited from the previously specified value performance values.

- For instance, if on December 1 the user has specified a weight value for indicator "KPI 1" equal to 3, then the program will automatically suggest this value for all dates after 12/1.
- If 12/5 is clicked on, the relative weight value for indicator "KPI 1" will be 3. If needed, this can be changed to new value, for instance, 6. Now for all dates between 12/1 and 12/4, the weight value for "KPI 1" will be 3, and for all dates after 12/5, 6. This is how the principle of inheritance works.

To make working with inheritance easier, the developers have implemented a special color scheme. If the indicator is highlighted with blue, then it means that some of its details were changed today. If the indicator is highlighted with gray, then it means that some of the indicator values have been inherited from past dates.

Time-specific and static values

Some values of indicator are time-specific, while others are not time-specific and are static.

- Static values are an indicator's **name**, and **description**. For instance, if you change the name of the indicator, then the new name will be used for all time points.
- Time-specific values can be configured in any way at any time point. Time-specific values are **Weight**, **Value**, **Min**, **Max**, **Baseline**, **Target**, and Optimization Method.

Synchronization with update interval

For any KPI an update interval can be defined via "Initiatives." In this case BSC Designer will synchronize calendar control displayed for this indicator with an update interval.

Grouping data by time points

KPI data on the charts and in the reports can be presented in aggregated form. Data grouping function need to be used in this case.

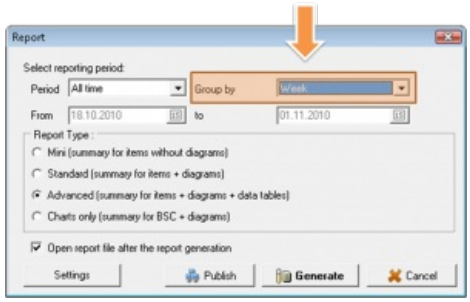
Grouping Data By Time Periods in BSC Designer

BSC Designer includes easy-to-use charts and reports, so you can see how the values of your indicators change over time. But if you define a new value for each indicator every day, your data tables can grow very quickly. After a month, these tables can be huge and that means, your charts and reports can become confusing.

The solution is to group your data, and display meaningful summaries.You can group an indicator's daily values into weekly, monthly, quarterly, or yearly values, to easily track the indicator's progress.

Grouping Data by Time Period

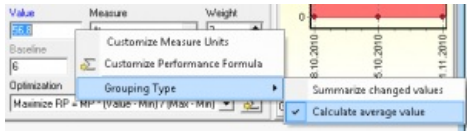
BSC Designer allows you to group the values of an indicator according to the **time period** of your choice.



To group the data in a **report**, use the "Group By" dropdown list in the report generation dialogue. When you display your report, it will identify the kind of grouping you used.

Once you open the "Group By" dropdown list for your chart or report, you can choose to group your data by day, or by week, and so forth, or you can choose "Customize" and define your own grouping period.

You can also customize your grouping period from the File menu. Just click on "Document Properties," and choose the "Grouping" tab.

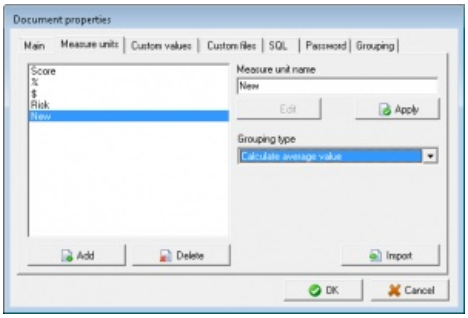


Just click on the indicator, right-click on "Value," open the "Grouping Type" submenu, and select "Summarize Changed Values" or "Document Default."

Default Grouping Types

Rather than choosing the "summarize" or "average" grouping type for each indicator one at a time, you can assign default grouping types by measure unit.

On the File menu, select document Properties," click on the Measure Units tab, and select a measure unit. Open the "Grouping Type" dropdown menu, and choose "Summarize Changed Values" (or calculate Average Value").

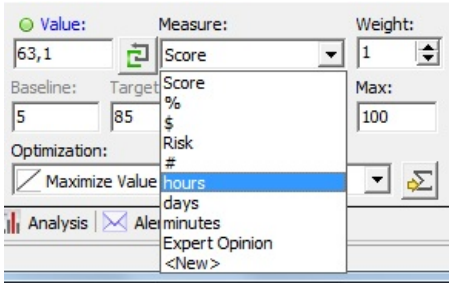


Now, whenever you group the values of any indicator that uses this measure unit, those values will be summarized (or averaged) by default. Of course, you can still give an indicator its own individual grouping type, which will override this default value.

Please note: You cannot change the default grouping type for a default measure unit. You can change the grouping type for the individual indicators that use a default measure unit. But you'll need to use your own, custom measure unit in order to set a default grouping type.

Add Custom Measure Units

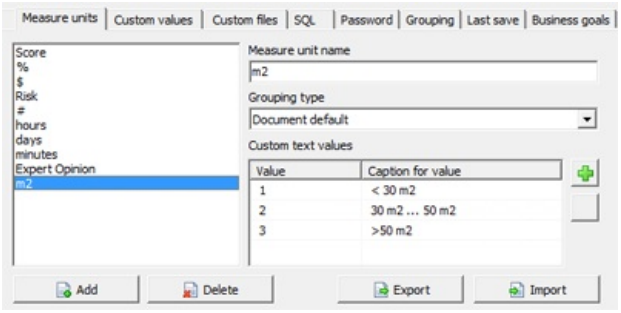
To Select One of the Custom Measures, select any indicator and then click on "Measure" drop-down list:



- To add new measure units select <New> option in the drop-down list.

Custom Units Dialog

Use the "Measure Units" tab (File menu > Properties > Measure Units) to manage custom measure units:



- Create and name new units of measure in any way you like, for instance, $/m2;
- Import and export the list of measure units from other projects of BSC Designer.

Create new measure units

1. Specify the name for new measure units. For instance: m2 stands for "square meters".

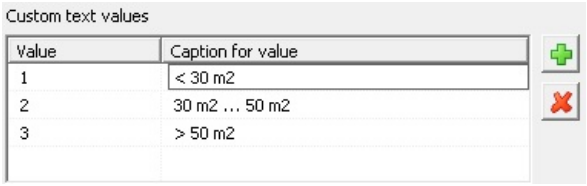
2. Select grouping type. Select groping type that will be default for items with this measure unit.

3. Custom text values. This option allows using some text values instead of integer values.

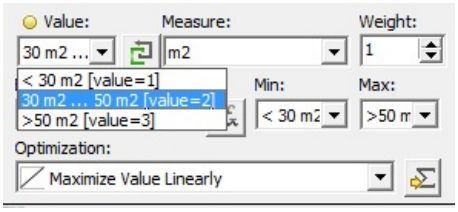
For instance: if your goal is to rate the area of some real estate you can use integers like 30 m2, 35 m2, 100 m2, but for your particular task it might be more important to classify all real estates into 3 groups like:

- < 30 m2 ... minimal score
- 30 m2 ... 50 m2 ... normal score
- >50 m2 ... excellent score

Use "+" button under "Custom text values" section to add these custom measure units:



4. **Finalize editing.** Click "OK" and use new measure units in your scorecard project:



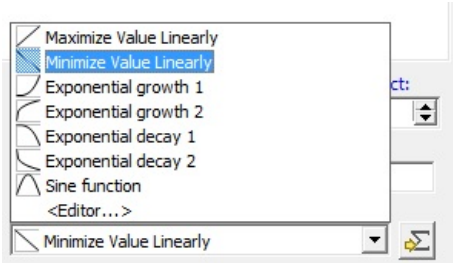
Once a measure unit has been created, it will be accessible in the "Measure" drop-down list for all indicators.

Custom Performance Formulas in BSC Designer

- *Custom performance formulas are available only in the PRO version*

Choose a predefined formula

Before creating a new custom formula, check the formulas available in BSC Designer, one of them might fit your needs:



Access custom formulas dialog

- Select indicator, use button in indicator's properties to access custom formulas dialog.

Building a custom formula

- Click "Variable" button to access the list of available variables
- Click "Function" button to access the list of available operations
- Click "Add condition" button to specify performace formulas for the value interval

Risk Indicators in BSC Designer

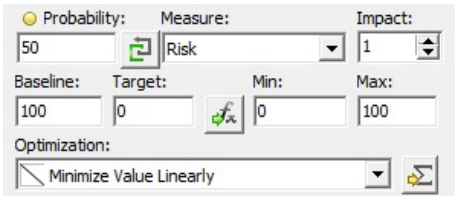
A risk indicator is a special type of indicator that focuses on risk.

- Any indicator can be converted into a Risk indicator.
- To convert an indicator into a Risk indicator, you should change the measure units to Risk.

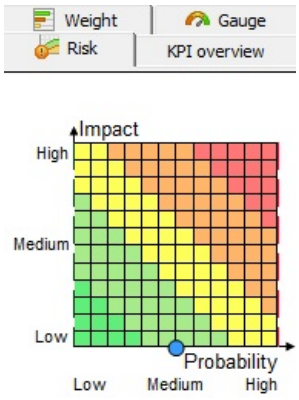
Properties of KRI

Risk Indicators have special properties:

- Probability
- Impact



- A "Risk" chart is available for risk indicators.
- Use the "Key Risk Indicators Report" command in the Reports > KPI Reports menu to generate a report that will contain risk indicators only.



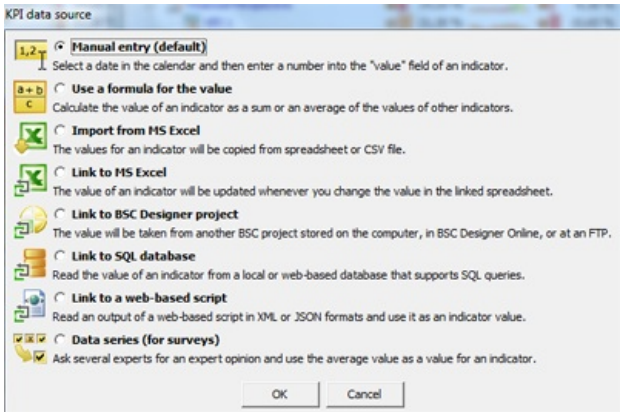
Other risk products

- On the BSC Designer website you will find the KRI Toolkit and Risk Assessment Guide.

Data Sources for KPIs in BSC Designer

Check out video manual for data sources.

One of the major parts of any business scorecard are performance indicators. They help to monitor the current business performance or track the progress towards some kind of business goals. It is important to have an easy to use means to enter data manually or to be able to access external data sources like data from their company's CRM or ERP systems.


KPI data source
Manual entry (default)
Select a date in the calendar and then enter a number into the "value" field of an indicator.
Use a formula for the value
Calculate the value of an indicator as a sum or an average of the values of other indicators.
Import from MS Excel
The values for an indicator will be copied from spreadsheet or CSV file.
Link to MS Excel
The value of an indicator will be updated whenever you change the value in the linked spreadsheet.
Link to BSC Designer project
The value will be taken from another BSC project stored on the computer, in BSC Designer Online, or at an FTP.
Link to SQL database
Read the value of an indicator from a local or web-based database that supports SQL queries.
Link to a web-based script
Read an output of a web-based script in XML or JSON formats and use it as an indicator value.
Data series (for surveys)
Ask several experts for an expert opinion and use the average value as a value for an indicator.
OK
Cancel

BSC Designer supports different ways to obtain the value of an indicator. It can be taken from some kind of database, a spreadsheet file, a web script output, or it can be entered manually.

Accessing data source

To access the data source of an indicator you need to follow these steps:

1. Go to the "KPIs" tab.
2. Choose any indicator there or create a new one.
3. Click on the "KPI data source" button that is located next to the "Value" field.

The "KPI Data Source" dialog will appear. It is a starting point to specify or modify a data source for an indicator. Several options are available there. Let's review them one by one.

Data Source Options

- The most used option is a **manual entry**. In this case the value of an indicator is entered by a person directly into the value field. You need to choose an appropriate date in the calendar control on the right and then enter a number into the "value" field.
  - If you need to update many values at once, then you might find it more useful to use the "Edit values" command, which is located in the KPIs menu.

- Sometimes you might need to do some calculations before you actually have the number you need. In this case, select the option "**Use formula for the value**." In the formula you can use any number or the reference to the current value, progress, or performance values of other indicators.
  - In the latest versions of BSC Designer an indicator can be a container for other indicators. When an indicator plays a role of a container it has its own formula as well. For example, you can choose to calculate a container's value as an average of child indicators.

- The next two options are "**Import from MS Excel**" and "**Link to MS Excel**."
  - Choose "Import from MS Excel" if you want to migrate your data from an Excel spreadsheet and use only BSC Designer in the future. Read more about importing values.
  - With the "Link to MS Excel" you tell BSC Designer what data from this spreadsheet you need; the program will read this data when needed. If the data will be updated in a spreadsheet, it will be updated in BSC Designer as well. Read more about this option.

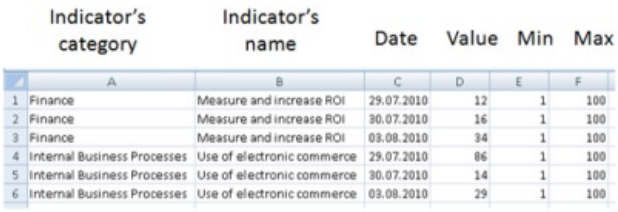
- The "**Link to BSC project**" option allows reading the data from another project file of BSC Designer. It is used for the **cascading** of your business scorecard projects. For example, in this way a department manager can obtain a value of an indicator from a lower-level scorecard of any employee. Read more...
- "**Link to SQL database**" option allows one to access the data stored in any database that supports SQL queries. BSC Designer can send a query to the database that is accessed locally or has a web access. To configure these options you might require the assistance of an IT administrator of your company. Read more about linking to SQL database.
- "**Link to a web-based script**" option is for those who want to integrate BSC Designer with some 3rd-party business system. Instead of giving access to the database you might want to create a web script that will generate an output in XML format. Read more about linking to web-based script.
- With "**Data series**" option you can use BSC Designer to manage survey answers. The program will calculate an average score by taking into account opinions of several experts, thus you will be able to use it for the indicator's value. Learn more about using data series.

As you can see, BSC Designer has many options that one can use to get important data into a scorecard. We recommend for you to try some of them with your data right now and see how it works for you.

Import Values From Excel

In most cases you will need to import data into your Balanced Scorecard from an external file, such as an MS Excel spreadsheet. Here are instructions for how to import values into a Balanced Scorecard project.

Here is the source project file:



	Indicator's category	Indicator's name	Date	Value	Min	Max
1	Finance	Measure and increase ROI	29.07.2010	12	1	100
2	Finance	Measure and increase ROI	30.07.2010	16	1	100
3	Finance	Measure and increase ROI	03.08.2010	34	1	100
4	Internal Business Processes	Use of electronic commerce	29.07.2010	86	1	100
5	Internal Business Processes	Use of electronic commerce	30.07.2010	14	1	100
6	Internal Business Processes	Use of electronic commerce	03.08.2010	29	1	100

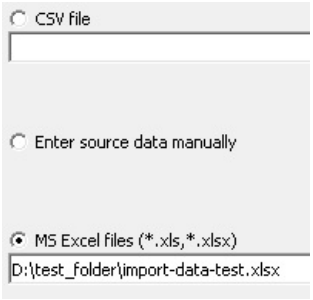
For testing purposes you can download this Excel file.

Step 1 - select the recipient for data import

Select an indicator, right-click on it and select the "Import Values" command in the contextual menu:

Step 2 - select the data source

Then select the source for your data, which could be an CSV file, MS Excel file or data that you will enter manually (copy and paste from your data source). If you enter data manually, you will be able to specify some custom delimiters for telling the program how to parse these data.



Step 3 - select the type of import

If during the first step you selected a container as a recipient for data, then you will be able to:

- Import data for this container (name, weight, description)
- Create a new indicator in this container and import data to this indicator
- Import values for several indicators

If during the first step you selected an indicator, then you will be able to:

- Use the first option "Import data for indicator"
- Create a new indicator, if you choose the "Import data for new indicator/container" option
- Import values for several indicators

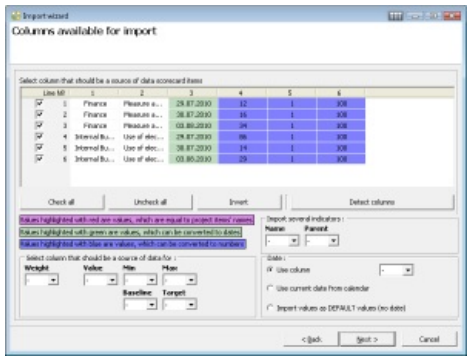
Importing values

The most advanced option is importing values for several indicators. If you are importing several indicators, the program will need to know where to search for indicator names and parent container.

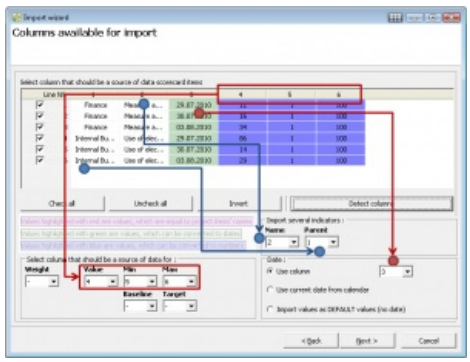
- The name of a parent container and indicator might be in separate columns. In this case, select the first option.
- Another possibility is that the name of indicator and its container are in the same column, for instance in the format "Container\Indicator". In this case you need to select the second option and specify the delimiter in the field below.

Associating columns in source data with indicators' properties

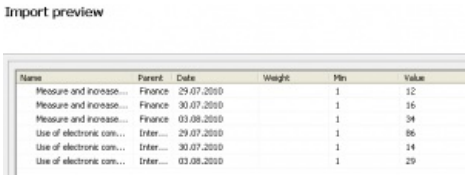
For the next step you will need to tell BSC Designer the meaning of columns in the data that you are importing. For instance, you need to tell it that column 1 should be associated with the name of the parent container of the indicator, column 2 should be associated with the name of the indicator, column 3 should be associated with the value of the indicator, and so on.
It is important to specify which column contains the information about the indicator's name and its parent container.



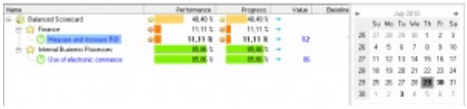
Additionally, you can tell BSC Designer that some of the columns in your data contain information about dates. Then BSC Designer will import the values of your indicators into a time point corresponding to the date column in your source data file.
If you are importing indicators for just one time point, you can select the "Use current date from calendar" option.



BSC Designer will show you a preview of the imported data:



When you finish the import process, you will see the imported indicators in BSC Designer. Click on the dates in the calendar to make sure that the right data were imported for the right dates:



Link KPI Value to Certain Cell in Excel File

BSC Designer allows you to link KPI value to the certain cell value in Excel file:

1. Go to the "KPIs" tab in BSC Designer and select KPI that you want to link
2. Click "Data Source" button next to "Value" field
3. Select "Link to MS Excel"
4. Select Excel file to import from
5. Select below the way you want BSC Designer to use to understand where the cell is located

There are several options suggested:

- "**Named range**". The most reliable one, but in your Excel file you need to select certain cell and mark it as a named range (check MS Excel manual for details)
- "**Fixed address**". In this case you will be able to select certain spreadsheet and then select certain cell. The problem with this method is that if you will add any column or line that will change the position of source cell, the imported data will be incorrect
- "**Near cell with indicator name**". If the name of your indicator is "New indicator 1" and in Excel file there is a cell "New indicator 1" and another cell next to it with necessary value, you can use text "New indicator 1" as a reference to find necessary value
- "**Near cell with custom descriptor**". The same idea as for "near cell with indicator name", but here you can specify any custom text, not just indicator name

Important notes about importing value from Excel in this way:

- The value is imported in the currently selected Time point. If you have selected in the Calendar current date the value will be imported for the current date;
- Each time you select "Tool" > "Update imported indicator" the latest value will be imported from Excel. If new time point is selected the new value will be imported into the new time point.

Linking Scorecards Together by KPI with BSC Designer

With BSC Designer, one can access KPI data from other BSC Designer projects. In this way it is possible to link several scorecards to the main one. For example, a financial director might be in charge of developing financial indicators; HR manager might be responsible for HR-related metric, or a CEO can have key data from several scorecards.

Storage options for an external project

In order to access KPI data the project should not necessarily be located on a local computer, here are all supported options:

- **Recommended:** .BSC project file can be stored in BSC Designer Online account (or on the locally installed BSC Designer Server). This option is recommended as in this case it is possible to setup access rights to the whole project or to certain indicators only.
- .BSC project file can be stored on computer's hard disk or on a local network
- .BSC project file can be placed on an FTP server

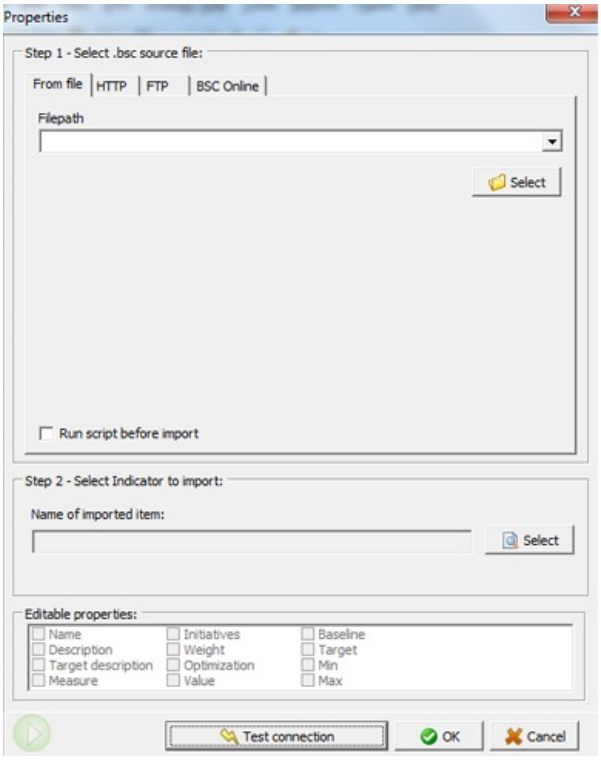
Here are some important details that one needs to understand about linking to external KPIs:

- Linking is not static; BSC Designer tries to read values from the external file every time the user opens his scorecard
- A user cannot change the imported values in his scorecard, he can only change the weight of imported values
- When linking to an external scorecard, time points are also supported
- Links between various .BSC projects might be visualized on a special type of strategy map.

Getting KPI data from external scorecard

Follow these simple steps:

1. Select an indicator or create a new one
2. Click "Data source" button
3. Select the "Link to BSC project" option
4. Select one of the importing option:
   - If you wish to link to the local file, select the "From file" tab;
   - If you wish to link to a file located on a web server, select the "HTTP" tab.
   - If you wish to link to a file stored on FTP server, select the "FTP" tab
   - If you wish to link to a project stored in BSC Designer Online (or BSC Designer Server), select the "BSC Online" tab;
5. Then you should click the "Select" button from the "Step 2" and select the name of the indicator to be imported.
6. Once you click OK, you will see the name of the new indicator on the KPI tab, and you can change its local name and weight.



Delegating indicators

Sometimes it is convenient to "delegate" an indicator or a container with several indicators. In this case BSC Designer will execute two functions:

- 1. It will move selected indicators to a new project,
- 2. It will link back moved indicators to the original project.

The author of the original project will no longer be able to edit the indicators, but it will still be possible to view their values. The owner of the new project will be responsible for updating the indicators' values.

To delegate indicators find the required indicator or container on the KPI tab, right click on it, and select "Export/Delegate menu."

Integration by independent developers

Independent developers can create applications which will help to integrate scorecards with any business solution.

Here is the list possible parameters:

- %indicator_name% - this is the name of the indicator in the "parent" scorecard, which initiates importing
- %project_name% - this is the .bsc project name
- %imported_indicator_name% - this is the original name of the indicator in the "child" scorecard, i.e., the scorecard which is the source of the imported data.

The following scenario shows how BSC Designer can be integrated with other applications:

1. A software developer can create a program which reads passed parameters (such as the "name of an indicator") and as a result creates a simple .bsc file (the .bsc file is in XML format, which is accessible to third-party developers).
2. The user in BSC Designer selects "Run script before import," specifies the application and the necessary parameters, for instance "script.exe %indicator_name%"

As a result, the program will run the script before reading data, and the script will create the necessary information to read and pass it to the user's scorecard.

Sometime it is a good idea to develop a script and use the described scheme, but it is also possible to import data using SQL indicators.

Import Data for an Indicator From External Database with SQL Query

In BSC Designer users can setup indicators and access 3rd party data sources (like databases of CRM or ERP systems) using SQL-queries. This part of the manual explains how to do it step-by-step and provides some examples.

Note:

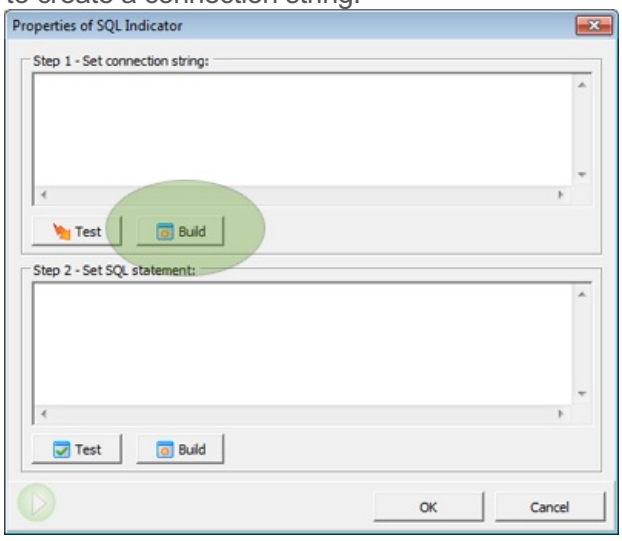
- Creating SQL requests might require technical knowledge, so if you encounter difficulties, please consult with IT professionals experienced in SQL / ADO.
- We have put together an example of how to use the scorecard in "\BSC Designer\Samples\Data via SQL," check readme-sql.txt in that folder before opening the samples.

Use SQL query as a data source for an indicator

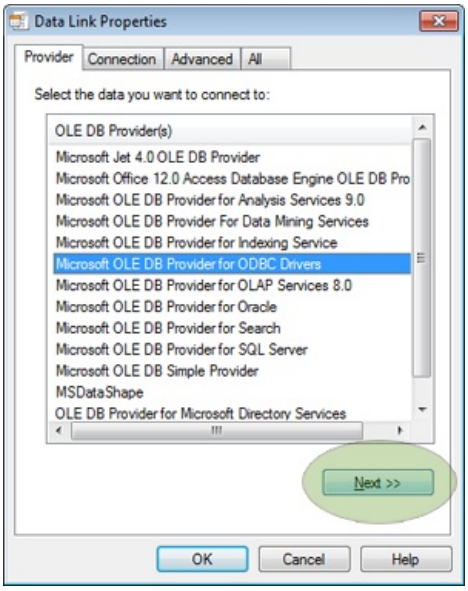
Here are the steps that one can follow to create a scorecard using external data for KPI:

Creating connection string

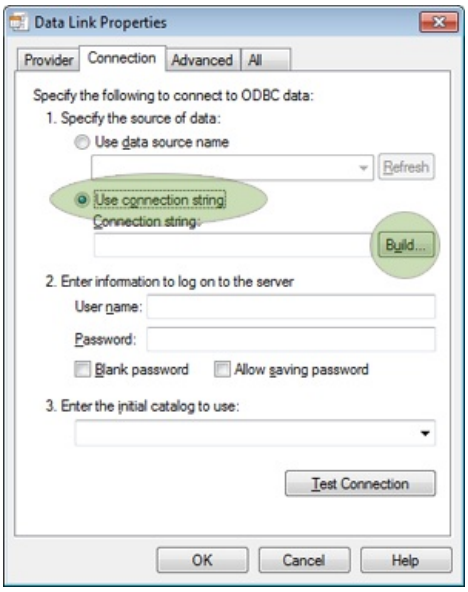
1. Launch BSC Designer
2. Create an indicator
3. Click "KPI Data Source" button
4. Select "Link to SQL Database"
5. Select a database with local or Web access
6. Click the "Build" button to create a connection string.



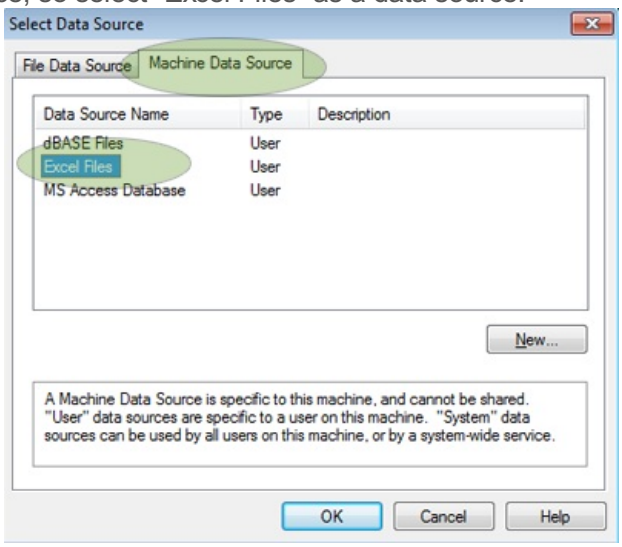
7. The first required step is to specify a data source. Please note: the number of available data sources depends on the ADO drivers installed on your system.
8. As an example, you can select ODBC Drivers and click "Next"


Data Link Properties
Provider
Connection
Advanced
All
Select the data you want to connect to:
OLE DB Provider(s)
Microsoft Jet 4.0 OLE DB Provider
Microsoft Office 12.0 Access Database Engine OLE DB Pro
Microsoft OLE DB Provider for Analysis Services 9.0
Microsoft OLE DB Provider For Data Mining Services
Microsoft OLE DB Provider for Indexing Service
Microsoft OLE DB Provider for ODBC Drivers
Microsoft OLE DB Provider for OLAP Services 8.0
Microsoft OLE DB Provider for Oracle
Microsoft OLE DB Provider for Search
Microsoft OLE DB Provider for SQL Server
Microsoft OLE DB Simple Provider
MSDataShape
OLE DB Provider for Microsoft Directory Services
Next >>
OK
Cancel
Help

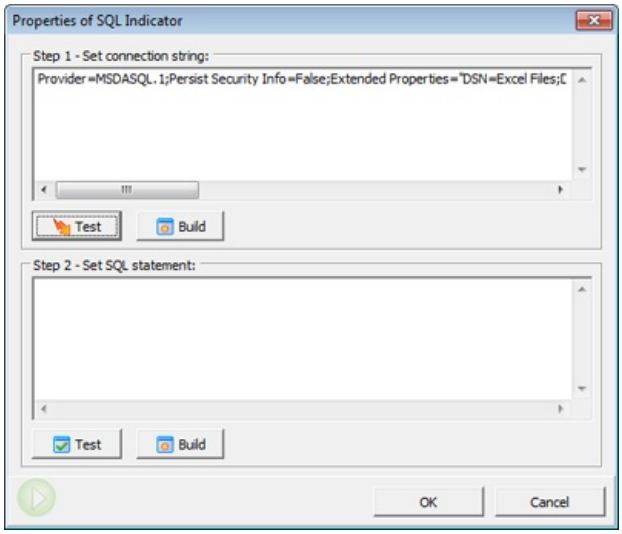
9. On the next tab, you will see "1. Data source." Use the radio button there to select "Use connection string." *Please note:* this dialog is a Windows dialog, not a dialog of BSC Designer, so it may be different in other Windows versions. Click the button to the right of this radio box (in Windows 7 it is "Build").



10. In the new dialog, go to the "Machine data source" tab. To demonstrate the function we'll use an Excel-based data source, so select "Excel Files" as a data source.



11. Double-click on it. Then select an MS Excel file (*.xls); you will find some in the BSC Designer installation (in the folder "\Samples\Data via SQL"). Click OK.

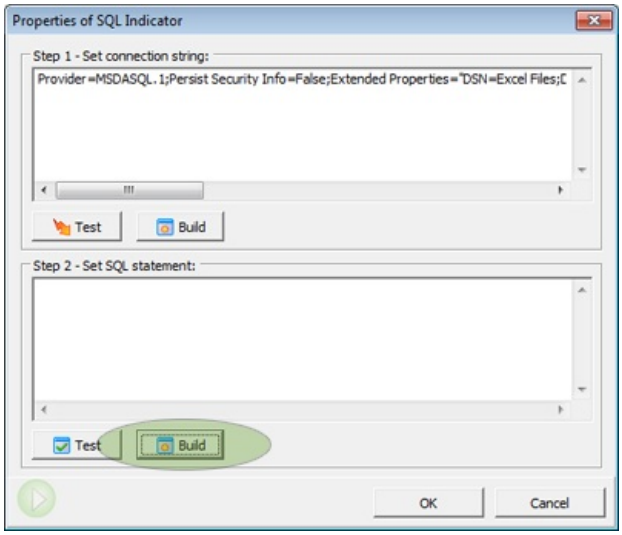


12. Click the "Test" button to make sure that the connection string settings are correct.

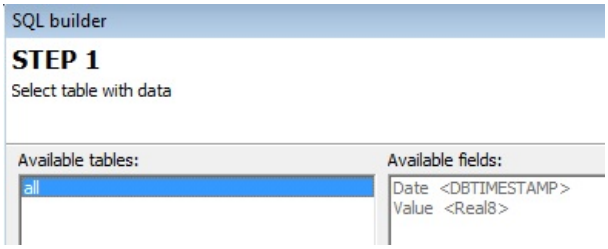
Creating SQL query

Now you will need to create an SQL query.

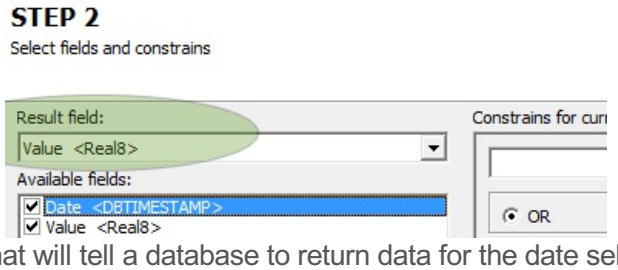
1. Click the "Build" button for "SQL statement"



2. In the first step BSC Designer will get a list of available tables (in our example it is a named range "all" in Excel file). Select a table and click the "Next" button.

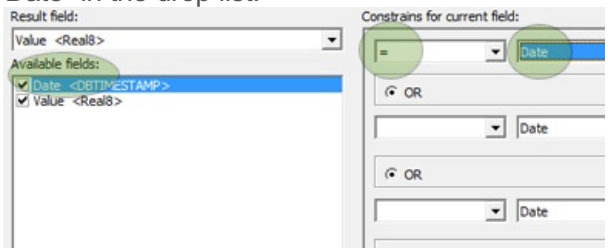


3. From the "Result field" drop list select the column that you want to use for the value of your KPI. In our example we choose the "Value" column.

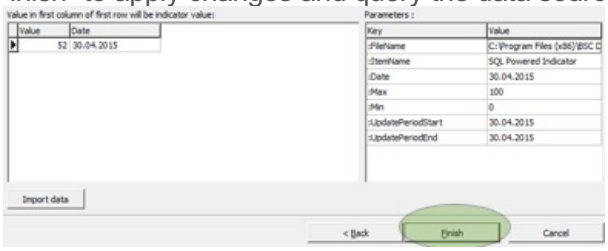


4. Now, add a condition that will tell a database to return data for the date selected in BSC

Designer's calendar. To do so, we need to select "Date" from available field list, and then select "=" as a condition, and "Date" in the drop list.



5. On the final step click "Finish" to apply changes and query the data source for the first time.



The resulted SQL query is as simple as:

```
SELECT `Value`,`Date`
FROM `all`
WHERE
( `Date` = :Date )
```

To make sure that BSC Designer actually reads the data from the data source select some date in the BSC Designer calendar. In our example, we can select 28 April, 2015 in the calendar, and the value for a KPI will be taken from the data source and it will be 39.

Parameters in request

:Date is not the only parameter supported by BSC Designer, here are some other parameters that you might want to use in your query:

- :FileName - will pass the file name of the current .bsc project
- :Date - will pass the current selected date in BSC Designer
- :UpdatePeriodEnd - the first date of the selected period (applies when update interval is specified). For the details, see the example below.
- :UpdatePeriodEnd - the last date of the selected period (applies when update interval is specified). For the details, see the example below.
- :ItemName - will pass the name of SQL indicator into SQL query
- :Max - passes the MAX value of an indicator
- :Min - passes the MIN value of an indicator

Getting aggregated values from a data source

In some cases you need to read from a database not just a single value, but get an aggregated value over a period. For example, in the project you might have an indicator "Monthly sales, $," but in the database there might be records for each order that your customers placed. Here is what you need to do in BSC Designer in this case:

1. Create a new indicator "Monthly sales, $"
2. Change its update interval to "Update monthly"
3. Now, instead of using :Date parameter in your SQL query, use :UpdatePeriodEnd and :UpdatePeriodEnd parameters

Update SQL query appropriately:

```
SELECT `Value`,`Date`
FROM `all`
WHERE
( `Date` BETWEEN :UpdatePeriodEnd and :UpdatePeriodEnd )
```

Additional settings

- Use "Document Properties" command in the "File" menu to access the "SQL" tab. You will find there additional settings that specify how the BSC Designer will access data using SQL indicators.

Build a KPI Using External Data Source in XML or JSON Formats

BSC Designer allows you to access data in XML or JSON format available online and use it or a KPI value. This is one of the possible ways to integrate BSC Designer with a 3rd party data source. This way requires some development on the client's side, but it is a good alternative to the usage of SQL indicators.

- This feature is available in the BSC Designer PRO edition only

Create HTTP indicator

Here are the steps to create an HTTP powered indicator.

1. Open a new or existent BSC project

2. Select "New HTTP indicator" command in the KPIs menu.

3. Specify script access URL and the necessary parameters

Parameters

Several parameters can be passed by BSC Designer to external script:

- %%name%% - BSC Designer will pass the name of the HTTP indicator.
- %%date%% - BSC Designer will pass the current date selected in BSC Designer's calendar.

If necessary, BSC Designer can convert the date parameter into the date format required by your script.

Script response

Server response should be in XML or JSON format.

An example of server response in XML format:

<?xml version="1.0" encoding="UTF-8"?>

<root><value>20.1</value><name>New indicator</name></root>

An example of server response in JSON format:

- {"value":20.1,"name":"New indicator"}

BSC Designer will read only **value** field in the response. Other fields will be ignored.

Test scripts

In the "New HTTP indicator" dialog there are test scripts that show how one can pass data to XML or

JSON scripts. Try using this two strings in BSC Designer and in web browser to see how to pass parameters and read server response:

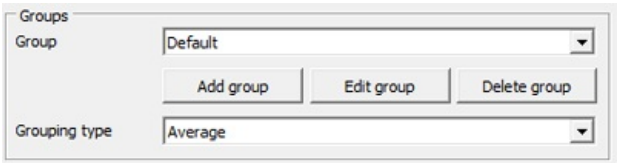
- http://www.webbsc.com/http_indicator_test/json?date=%%date%%&name=%%name%% - JSON test script
- http://www.webbsc.com/http_indicator_test/xml?date=%%date%%&name=%%name%% - XML test script

Power KPI with the Results of Surveys in BSC Designer

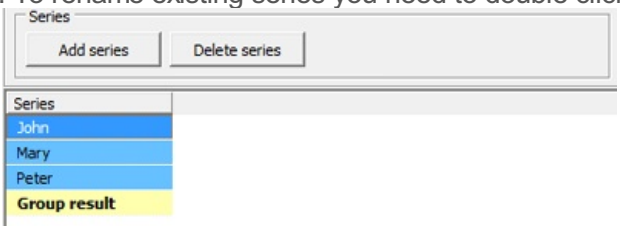
In some cases the value of the KPI is not taken from a database, but is based on the opinion of several experts. In BSC Designer this data source that is called "Data series," it will help to enter the results of survey, calculate an average score, and track it over time.

Here are the steps to use the "Data series."

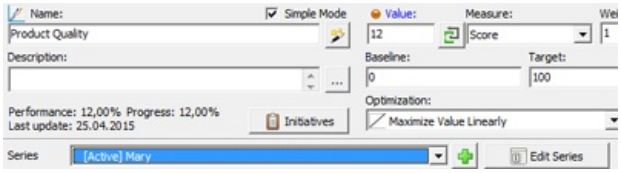
1. Create a new indicator where the value should be calculated according to the type of survey. For example: 'Product Quality' might be determined according to the interview with several end customers or experts.
2. Click "Data source" button and select "Data Series" as a data source option.
3. In the "Group" drop list select a group "Default" or create a new group. The group is the name of the survey that we want to conduct.



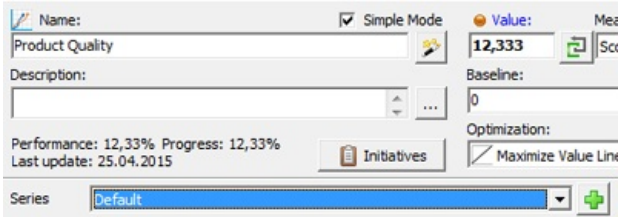
4. Select the appropriate "Grouping type."
   For example: you might want to calculate the "Average" score of all expert opinions.
5. Use the "Add series" button to add an appropriate number of series.
   For example: if you interviewed 3 experts then you need 3 series. You can use experts' names for the names of series. To rename existing series you need to double click on it in the table.



6. Close "Series" dialog.
7. You will notice that "Series" toolbar appeared below the KPI settings.
8. In the series drop list select the name of the series. In our example it will be the name of an expert.



9. Enter the interview result for this expert in "Value" field
10. Repeat two previous steps for other experts
11. Click on drop list "Series" again and select your group name
    In our example the group name was "Default."
12. The "Value" of an indicator is now calculated as an average of expert scores



Following these steps one can add interview/survey data in KPI in BSC Designer.

Here are some useful tips and tricks for this function:

- You can still use time points. It means that you can interview experts regularly (monthly or quarterly), enter the data for each interview session and see how expert opinion is changed over the time.
- You might want to use customer measure units, in that case experts won't need to come up with a score, but will be able to give their opinion on the scale from "Bad" to "Excellent" or some other custom scale.
- One series group can be associated with many indicators, e.g. you might want to ask experts about "product quality" and "customer service quality."
- If you closed the toolbar, then you can display it again via View > Toolbars > Panel "Series."
- In the menu "Reports > KPI Reports" there is a special "Series" report.
- On the top of Series dialog you can find the "Chart" tab. Use it to display some trends related to the survey that you have done.

Export Values From KPIs

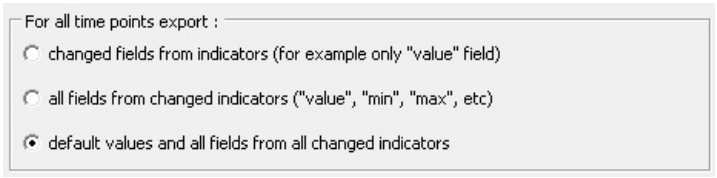
With BSC Designer You Can Export Indicator Values, Including current values, weights, min and max, baseline and target values.

Step 1. Run Export

- Select any indicator.
- Right-click on the indicator and select "Export\Delegate" > "Export values".
- Follow the "Export" wizard. You will be asked if you wish to export the whole document or only the selected item.

Step 2. Select level of detail

BSC Designer supports different detail levels for export:


For all time points export :
changed fields from indicators (for example only "value" field)
all fields from changed indicators ("value", "min", "max", etc)
default values and all fields from all changed indicators

- "**Changed fields from indicators**" - only changed fields will be exported. For instance, if the "Min" field was changed, but the "Max" field was not changed, then BSC Designer will export only the value of the "Min" field.
- "**All fields from changed indicators**" - if one of the fields for the indicator was changed, then the values of all other fields for this indicator will be exported as well.
- "**Default values and all fields...**" - with this option BSC Designer will export all possible values, including default and inherited values.
- Values for selected dates

Step 3. Select columns to export

For this step select the columns to be exported.

Step 4. Preview

Verify that the displayed data are what you need.

Step 5. Destination file name

Enter the name of the file where the data should be saved. You can use the .csv extension so that you can open the data in MS Excel.

Initiatives and Action Plans

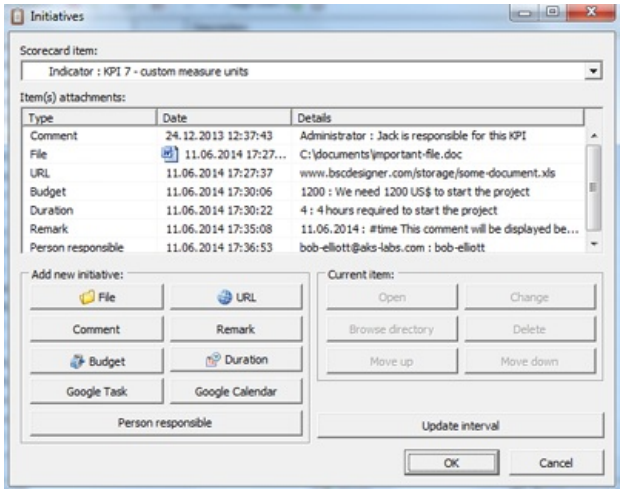
Check out video manual for "Initiatives"

An action plan is an important part of any business scorecard. We can have KPIs, business goals, and strategy maps, but the final and the most important step is always an action. BSC Designer allows you to align any business goal or indicator with an initiative.

An initiative in BSC Designer might be:

- a simple text comment,
- a link to some important document, or
- a key information about the specific time and budget needed.

Some member of your team will work according to the defined plan. BSC Designer allows you to specify a **person responsible** and make sure that this person receives important notifications about an indicator and receives **updates** on an indicator's value on a regular basis.



Access an initiative dialog

In the interface of the program initiatives are marked with a "clipboard" icon. There are several ways to access an initiative:

- You can go to the "Business goals" tab, select there any business objective and click the "Initiatives" button.
- Each indicator on the "KPIs" tab has an "Initiatives" button as well. This button allows you to start an "Initiatives" dialog for an indicator.

Note: All items that already have an initiatives aligned with them are marked with an "initiative" icon. You can click onto this icon to access the "Initiatives" dialog.

- For example, on the strategy map BSC Designer visualizes initiatives with the same "initiative" icon. You can double click onto this icon to view existing initiatives.

Initiative dialog

In the "Initiatives" dialog you have:

- "Scorecard item" drop box that displays a business objective or an indicator that we are working with now.
- The list of initiatives aligned with selected business objective or indicator.
- Controls that allow adding new initiatives or modifying existent ones.

Types of initiatives

BSC Designer supports several types of initiatives.

- With the File button you can add a link to some important local document.
- With the URL button you can add a link to some webpage or document located in the cloud storage.
- With the "Comment" and "Remark" buttons you can add some text notes.
    - The difference between these options is that "Remark" is time-specific, it means that this note will appear only for the certain date in the reports.
    - For "Comment" and "Remark" initiatives it is possible to add a chart tag. In this way you tell BSC Designer that you want this comment to be displayed below this chart in the reports.
- Budget and Duration initiatives allow you to specify important information about the budget associated with this business objective or about the time needed to executive some sort of action plan. Later you can use "Budget and duration report" command in "Reports" menu to generate a report that will summarize the budget and duration details for your scorecard project.
- In the initiatives dialog there are "Google Task" and "Google Calendar" buttons that you can use to create a new task or event for selected business objective or indicator. BSC Designer will save your time and fill in some details about business objectives or an indicator for you.

Person responsible

Any initiative associated with an indicator or business objective can have a person responsible. Click the "Person responsible" button in the "Initiatives" dialog to access this function.

You can select a person responsible from the list of users in your group. Then you can setup notifications that will be sent to this person or persons. For example, you might want to send a notification to a person responsible when an indicator is in the red zone or a new initiative was added.

To work with your user group you will need to set up an account with BSC Designer Online and to add some members of your team there.

Update interval

Having indicators in your scorecard project implies that you want to update their values regularly. BSC Designer helps to ensure that all of the indicators are updated on time.

- Use the "Update interval" button to specify the parameters of an update interval. For example, you can choose to update indicators quarterly or monthly.

- There is a check box entitled "Permit input only for update dates." If checked, BSC Designer will update calendar control appropriately, and will allow you to enter indicator data only for specific time points.

Initiatives report

In a business scorecard project one might have many initiatives associated with indicators or business objectives. Sometimes it is necessary to have a list of all of these initiatives together with important details and names of the persons responsible. To create this list you can use the "Initiatives report" command in the "Reports" menu.

BSC Designer allows you to choose what initiatives you'd like to see in this report. You can create just a list of all of the initiatives sorted by date or you can generate a report with all of the business objectives and indicators from your project together with the details about all of the existing initiatives.

If your project is big one, you can choose to generate this report for some specific branch. For example, you can generate this report for initiatives from a "Financial" perspective only.

Initiatives in BSC Designer are a great way to keep a track of all of your important action plans and action reports. You don't need to have here a detailed log of everything that is happening in your company, as we are sure that you have your favorite teamwork tools for this. But you can add some important details that will help your team to make a right decision about business objectives and indicators.

Adding Remarks and Comment to a Diagram

With BSC Designer it is possible to create comments for KPIs that will be later added next to the diagram in HTML or PowerPoint report.

- This feature is available in BSC Designer PRO edition only

Adding comments

Comments can be added to a KPI in a form of a "comment" or "remark" initiative.

1. Select any KPI on the "KPIs" tab

2. Click the "Initiatives" button

3. Click "Comment" or the "Remark" button to add a new comment

4. In the "Comment" dialog you will see "Add chart tag" button. Click it and select "Gauge - #gauge."

In this way you will associate a comment for this KPI with a "Gauge" diagram.

5. '#gauge' text will appear in the comment text box, so don't delete it. This is a marker that tells BSC Designer about an associated between this comment and this diagram.

6. Add some text to the comment. The result will look like: "#gauge. Here is some text."

Testing comments

Try creating an "HTML Report" or a "PowerPoint" report, and you will see that your text will be displayed under the Gauge diagram.

- The difference between a "comment" and "remark" is that "remark" is date specific. The report will include only remarks within a selected reporting period.

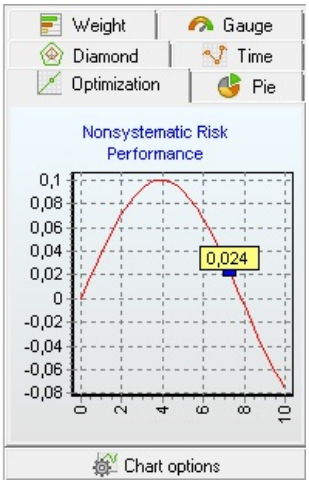
Diagrams and Charts in BSC Designer

There are several types of charts in the BSC Designer. To access these charts, click on any of indicators, the relevant Chart will appear on the right side.

- To access a detailed diagram, double-click on the diagram.
- If you need to insert a diagram into your presentation, use the "Copy image" button for this purpose.
- Select "Dashboard" tab on the bottom to switch to the *dashboard* view where all supported charts are displayed in a one place.

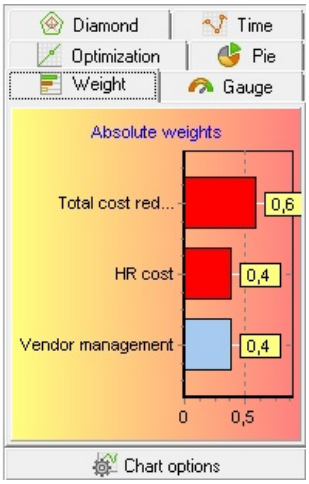
Optimization chart

Displays the function used as the optimization method. This function can be customized.



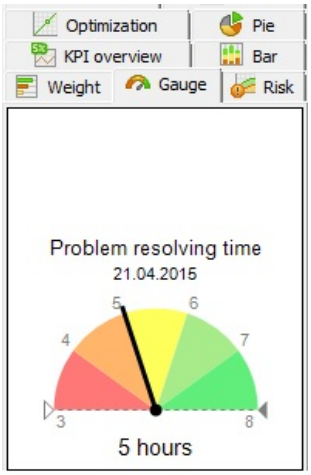
Weight chart

The weight chart shows the absolute weights of indicators.



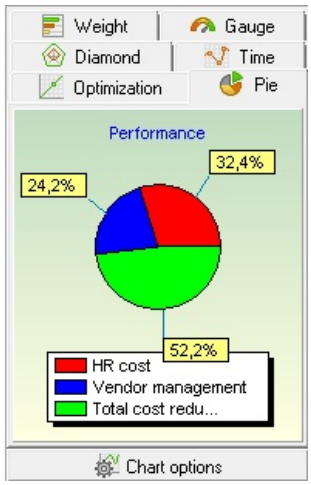
Gauge chart

This type of chart shows the min-max scale and current value on this scale.



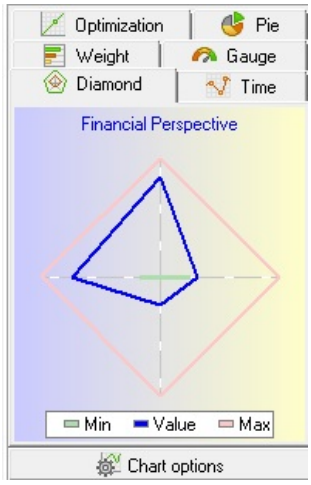
Pie

A pie chart represents the performance of each indicator within a container if the container is selected. If the root is selected, the chart will display the performance of each container.



Radar chart

A radar-type chart is built if the user selects a container which contains three or more sub-items.



BSC Designer can build a report using this type of diagram; this report is called a Dashboard Report.

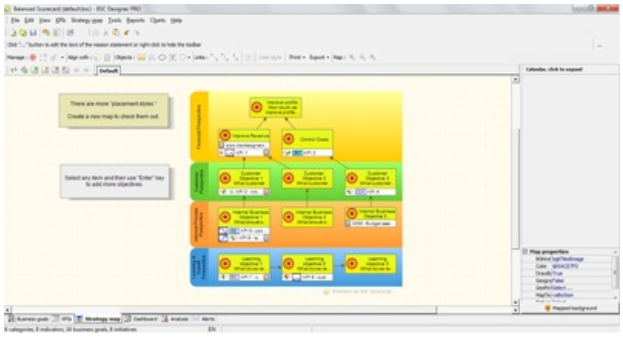
Time chart diagram

A time chart diagram represents changes in performance for the indicator according to the time points specified in the project.

Strategy Maps in BSC Designer

Check out video manual for strategy maps.

A strategy map is a great business tool that helps to share the big picture of your business challenges with your team. A properly designed strategy map explains a business context, helps to communicate your strategy, and is a base for the discussion of a company's objectives.



Strategy map in BSC Designer is not just a simple drawing or presentation tool. It visualizes business goals, connections between them, and aligned KPIs.

In a business scorecard project you can have many maps:

- One can be a "big picture" of your strategy,
- Another might be a performance dashboard for various regions, or
- You can have business process maps.

No more time-consuming designs using presentation software! Those maps have no live data for indicators, and are hard to maintain! In the contrast, maps in BSC Designer can be created almost automatically and visualize all the data you need.

Create a new strategy map

To create a new strategy map follow these steps:

- Go to the "Strategy Map" tab.
- Click "Add strategy map" button.

Before using various automation features that Map Wizard suggests, let's start with a blank map:

- Use toolbar to create new objects like:
    - Text box,
    - Rectangle, or
    - Ellipse.
- Choose more drawing shapes from the drop down list.

    - Add to the map a logo of your company using an "image" tool.

The new objects are fully customizable:

- Double click onto the object to change its text
- Use the object's properties on the right to change:
    - Text alignment,
    - Color,
    - Shadow and gradient,
    - Rotation angle, and
    - Font settings.
- Any two objects on the map can be linked using several link types.

Adding business goals and KPIs

For now, BSC Designer was used as a classical drawing tool. Now, let's add some live data.

- Use "Add Business Goal" button to have a copy of a business goal on the map.
    - Use "Show indicators" property to switch the display of aligned indicators and initiatives.
- Use "Add KPI" button to visualize some of the indicators that are relevant to the map.
    - Switch to the "compact mode" and change the "glyph" using the properties panel.

The resulting map is not just a nice diagram that can be created in any presentation software, but is a live map with business objectives, initiative, and indicators.

- If the values of indicators are updated, the KPIs on the strategy map will be updated as well.
- You can double click onto any indicator or business goal to go to the details.

In this way you can create business process maps, and add some indicators that visualize control points of these processes.

Balanced Scorecard map

There are some maps that BSC Designer can create automatically using the data about business objectives, their connections, and aligned KPIs.

- Start Strategy Map Wizard
- Choose "Balanced Scorecard" option
- Click "Execute" button.

On the new map there are four perspectives that correspond to the top level objectives from the "Business goals" tab.

- Each perspective includes some business goals.
    - These business goals are **linked** with each other.
    - Some goals have a KPI and an action plan aligned with them.
    - Goals that belong to the different *strategic themes* use different color coding.
- Double click onto the business goal item to go to the details of the business goal.
    - Customize the links between business goals using "Contributes to" and "Contributed by" fields
    - Use "Display on strategy map" check box if you don't want to visualize certain goals
    - Select aligned indicator to define the way that it is visualized on the strategy map.
    - Associate business goal with a specific strategic theme.

All the details about the "Business goal" tab were explained in the respective section of the manual. You can continue using the "Business Goals" tab, or you can go back to the "Strategy map" tab and start **managing your business goals directly from the map**.

- To add a new business goal, select some existing business goal. Then:
    - Press the "Enter" key on your keyboard, or
    - Click the "Add business goal" button on the toolbar
- The "Parent" property shows where the new goal will be placed.
- The "Contributes to" property shows the linkage between the new goal and other goals.
- As a result:
    - The new goal will appear on the map next to the parent,
    - The cause-and-effect connection will be visualized.

Creating links visually

You can also use "link" buttons to define relationships between goals. Create a new link, BSC Designer will ask if you want to create a cause-and-effect connection.

- If you answer "No" then you will just have a visual link.
- If you answer "Yes" then "contributes to" and "contributed by" fields of respective objects will be updated.

Align KPIs

In the example with the business process map we added a stand-alone KPI to a strategy map. Another way to visualize a KPI on the map is to "align" an indicator with a business goal.

- Select any business goal, then select the "Align with a KPI" option in the "Add KPI" menu on the toolbar.
    - BSC Designer will display all of the KPIs that are available in the project and have not

been aligned with any business goal yet.

- Confirm the choice to start displaying indicators in the area below a business goal.

Updating the map

After changes are made to the business goals, BSC Designer will ask your permission to update a strategy map. When updating, BSC Designer will clear an old map and build a new one. As a result, it will change the positions and styles of objects to the default ones, **unless the "Lock" function** was used.

- With the "Lock" function you have an option to lock an object's **position** and/or an object's **style**
    - If you don't want BSC Designer to change anything about an object, then select this item and click the "Lock" button.
    - If you customized an object's appearance, then you might want to lock **the style** of the object only.

Map with KPIs

Another map type that BSC Designer can build is a "Map with KPIs."

- Select this map type and then choose one of the ready-to-use templates.

Now, you can associate some KPIs with certain regions on the map:

- Go to the "KPIs" tab,
- Right-click on any KPI, and
- Select the "Link item to the map" option.

The list of the regions from the map will appear. For example, we can associate a selected indicator with "Austria."

- Switch to the "Strategy map" tab. BSC Designer updates the map and displays the KPIs in a respective region.

Toolbar for the map with KPIs

To create your own map with regions use the toolbar on the right. You will need to:

- Select a picture for "Mapped background"
- Use one of the three buttons on the toolbar to map the regions
- Now, any KPI can be associated with these new regions

You are not limited to geographical maps only. Find "Hotel Balanced Scorecard" project in "Samples" of BSC Designer. In that project we used a hotel picture as a mapped background image, and created specific areas to reflect various processes in a hotel, and aligned KPIs with them.

Learn more about creating new maps with KPIs.

Overview map

Sometimes, you don't need a map with all of the details. In this case choose "Overview" map in the Map Wizard. This map displays top level KPIs or business goals only. It is useful if you do a presentation or need to explain key parts of your strategy to partners or the press.

KPI map

On the "Others" tab there are maps that BSC Designer can build for KPIs or business goals. The program uses different placement algorithm for each of the maps.

- In the manual for "KPIs" we were talking about a *weight* property of an indicator. It shows the relevant importance of the indicator compared to other indicators.
- There is a check box "Pen width for links depends on items weight." If checked, BSC Designer will visualize indicators with a higher weight using the thicker links.

Cascading map

When the business scorecard is implemented across the company the scorecards of business units are connected into a cascading scorecard. A typical situation is when a top level scorecard reads the data from the department level scorecard. These connections might be complicated and hard to track.

- "Cascading projects" map in BSC Designer shows all of the scorecards involved in cascading.

Check out "Cascading" project in the "Samples" folder.

- Open the "Main" project
- The indicators on the "KPIs" tab are taken from other scorecards
- Switch to the "Strategy map" tab to check out the "Cascading projects" map.

A "Cascading projects and indicators" map is similar, but includes even more details about cascading.

Integrate strategy map in your business process

In BSC Designer strategy maps, business goals, KPIs, and dashboards are connected.

- To align a map with certain business goal, go to the "Business goals" tab, select any business goal and click the "Map link" button.
- To have a copy of some important map on the dashboard, right click onto any strategy map and select the "Send to dashboard" command.

With the "Export" menu you can easily have a copy of your strategy map as a picture file or create an HTML report.

Finally, we take map printing seriously:

- The "Select printable area" command in the "Print" menu helps to mark the printable part of the map.
- In the "Print preview" dialog "Find the optimal parameters" and "Page orientation" controls help to fit your map to the paper size.

Conclusion

As you can see, a strategy map in BSC Designer is not just a drawing tool. It can be an excellent tool to visualize some important business processes, with business objectives and KPIs. It can serve as a base for strategy discussions, performance reviews, or a presentation of your strategic ideas.

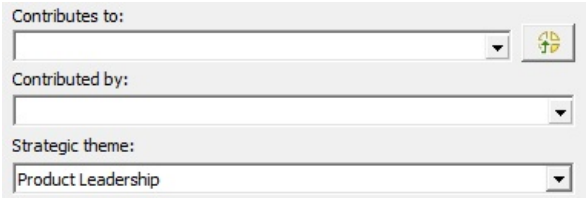
Strategic Themes in BSC Designer

When describing a business strategy you might want to group your business goals into strategic themes. In this way you will be able to visually separate different directions of your strategy.
With BSC Designer you can:

- Associate a business goal with one of the 3 **predefined strategic themes**, or **create** your own one.
- Create a strategy map where business goals that belong to the different strategic themes are marked with **different colors**.
- Choose whether to **display** all strategic themes or only some of them.

Selecting predefined strategic theme

To select one of the predefined strategic theme follow these steps.



1. Go to the "Business goals" tab.
2. Select any business goal or create a new one.
3. Choose one of the options from the "Strategic theme" drop down list on the right.

Adding a new strategic theme

You can customize existing strategic themes or add a new one:

1. Select "Strategic theme" option in "Strategy map" menu.
2. Select any existent strategic theme in the drop list "Name" or click "Add" button to create a new one.
3. Use description field to add more details about the purpose of this strategic theme.
4. Use various parameters in "Settings" to customize colors that are used for the selected theme.

Building strategy map with strategic themes

BSC Designer can automatically create a strategy map with strategic themes.

1. Go to the "Strategy map" tab.
2. Click "Placement wizard" button on the
3. Select "Balanced Scorecard" map type.

4. Use "Display themes" drop list in the custom settings to choose strategic themes that need to be displayed on the strategy map.

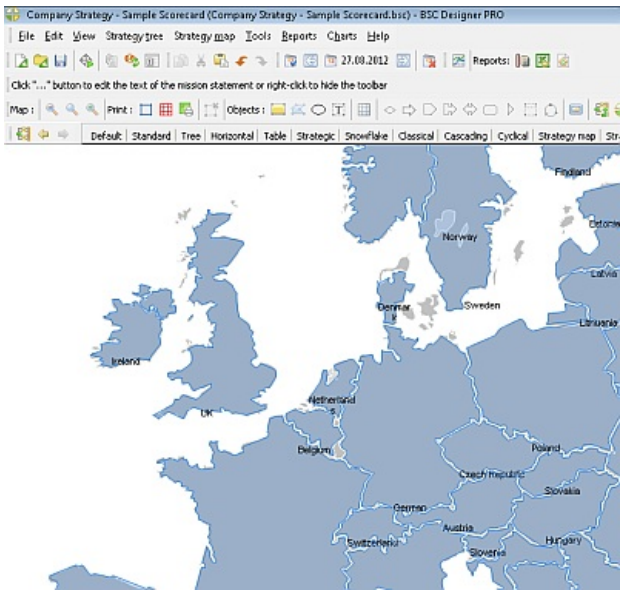
Link KPI to Specific Location on the Strategy Map

BSC Designer allows link KPIs with specific location on the strategy map. It is useful if KPI is responsible for certain geographical area.

Loading map

Select "Strategy Map" > "Placement Wizard" -> "Map with KPIs". BSC Designer will suggest you several options.

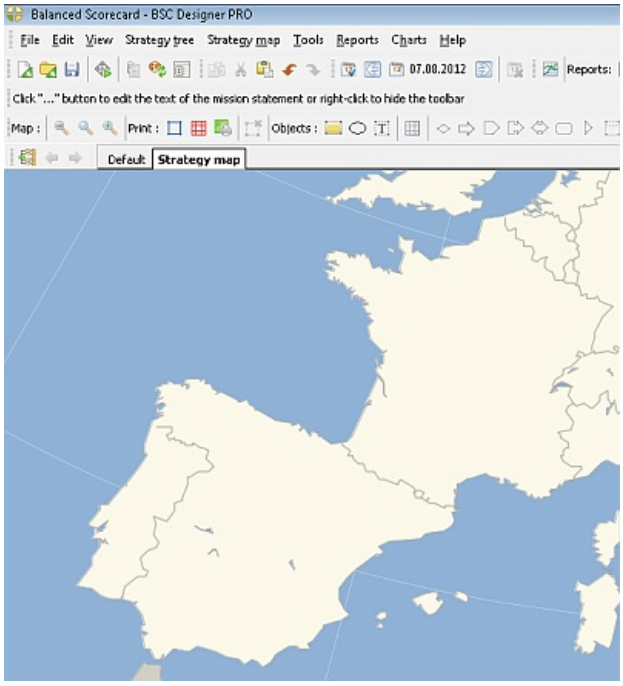
- **Select picture file of the new map**. In this case you can select any picture (.png, .jpg and other formats) and use it as a background of the map. Disadvantage of this approach is that you will need manually select certain areas on the map and mark then by adding name of the certain location.
- **Import mapped location from file.** In this case you can import mapped locations from any other BSC Designer project. This option is useful if you have a map of the certain region with marks designed in BSC Designer and you want to re-use it.
- **Select ready-to-use map template.** Together with BSC Designer we distribute some free to use maps with marked locations. You can use this maps as a starting point for your project.



- **Create empty map.** Will do nothing, so later you will need to click "Mapped Background" button to select new background for the map.

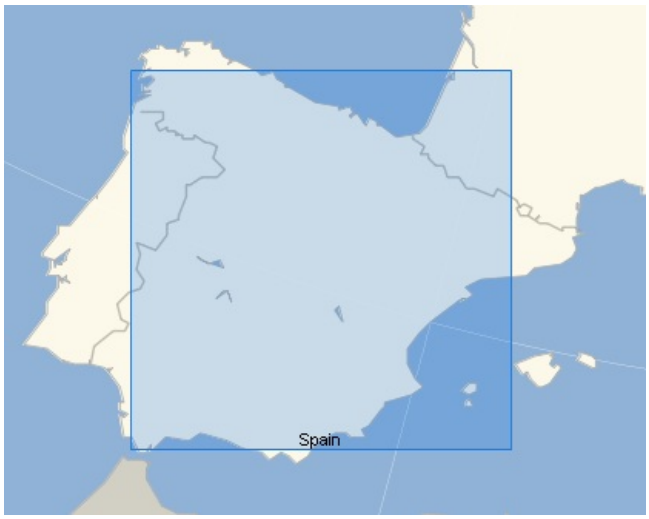
Marking locations

1. Load any map following of the methods specified above. You will see something like this:


Balanced Scorecard - BSC Designer PRO
File Edit View Strategy tree Strategy map Tools Reports Charts Help
07.08.2012
Reports:
Click "..." button to edit the text of the mission statement or right-click to hide the toolbar
Map :
Print :
Objects :
Default
Strategy map

2. Select area of the Spain. When you will release mouse button "Create MapMark from selection" menu option will appear. Click on this menu option. In the dialog "Enter area name" enter "Spain".

3. Now your map is marked and looks like:



Auto detecting area on the map

1. Open any map where countries or regions have only borders without any lines or marks inside:

2. Select "Auto-detect map mark" button

3. Click in the center of area.

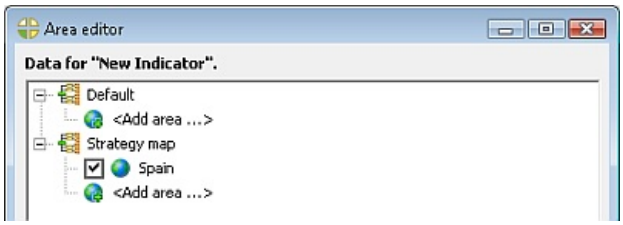
4. BSC Designer will highlight selected region and suggest to enter name for this region:

Note:

- if user needs to merge two separate regions use "Merge map marks" button.
- to create custom region user can apply "New polygon map mark" button.

Associating KPIs with map locations

1. Go to the "KPIs" tab
2. Select any indicator
3. Right-click on indicator and select "Link item to the map"
4. In the dialog select necessary region, in this example it is Spain. Click "OK".



Important note: in the same way you can link any container with certain map mark.

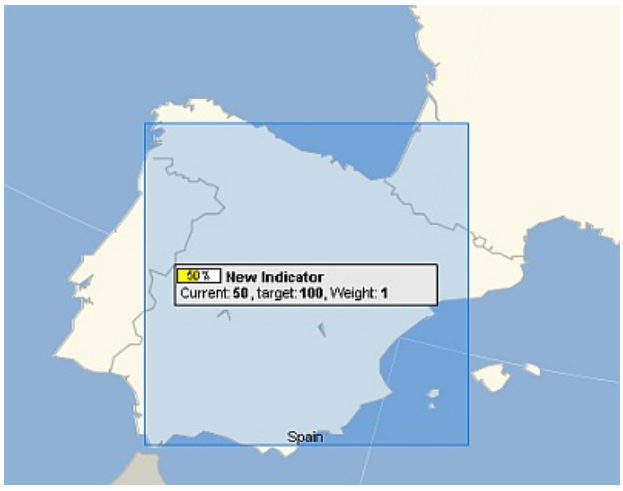
Automatic placement of KPIs linked to map of the map

Now KPI "New Indicator" is linked to "Spain" map mark. If you will switch to the "Strategy Map" tab the program will automatically suggest you to update your strategy map or you can do this manually.

Follow this steps to update your strategic map.

1. Select "Placement Wizard" in "Strategy Map" menu.
2. Make sure "Map with KPIs" option is selected.
3. Click "Execute".

Now your map will have KPI on in in the certain area. The size of KPI on the map depends on size of the area and number of KPIs. If area is small or there is a high number of KPIs their format will be automatically updated to the smaller one.



Dashboards in BSC Designer

Check out video manual for "Dashboard" function

A typical business scorecard project includes many indicators that help monitor business performance and track the progress towards business objectives. Sometimes is it necessary to have a single view of specific indicators only.

For some indicators it is necessary to see how they were performing in the past, and for others the current performance figures are of more importance.

In BSC Designer we have **dashboards** that can be configured to display the most important charts for indicators.

All the dashboards controls are located on the "**Dashboard**" tab. Here you have:

- A tool bar that allows creating a new;
- A tool bar that allows adding new charts and arranging them;
- A calendar control that will be useful to specify the time scope for the visualized data.

To add a new chart to a dashboard click the "Add" button. From the appeared sub menu you can:

- Add a chart for an indicator to a dashboard,
- Visualize a copy of an indicator,
- Have a copy of business goal, or
- Even display some important strategy map from this or another project file.

When adding a new chart the program will suggest for you to select a source indicator and the type of the chart.

- There is a check-box "**Display data for KPI items selected in KPI tree on the left**." If checked, BSC Designer will make a "free" chart. It won't be linked to any specific indicator, and you will be able to use a list of indicators on the left and choose one that you want to be visualized on this chart.
- For some charts it makes sense adding several indicators so that you can see several trends at once. To do so, press and hold the "Control" key on your keyboard when selecting indicators.
- Each chart added to the dashboard has its own small tool bar. This tool bar is different for each

type of the chart. For example, for a **time chart** you will be able to add another indicator to the chart, or choose the time period for the visualization.
- Right-click on the chart to bring it to the front or **move it** to the back. In this context menu you can also choose to go to the KPI that is a source indicator for this chart.

On the dashboard you can use all of the types of charts supported by BSC Designer. Check out the appropriate section of the manual for the details about specific chart types.

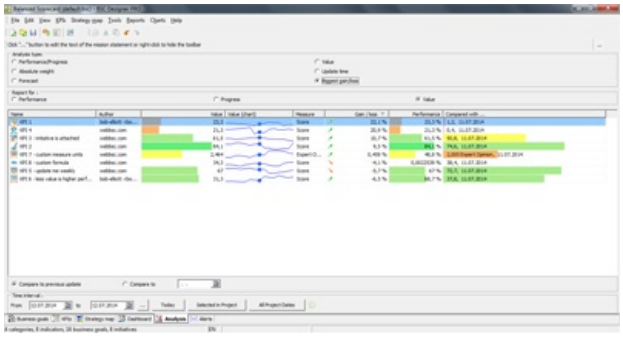
In BSC Designer you are not limited by a single dashboard only. You can add more dashboards and visualize on them various aspects of your scorecard project. If you need to share a dashboard you can generate a dashboard report using the "**Report**" button on the right.

With dashboards one can have a quick view of what's going on in the business right now. Make sure that your scorecard projects includes dashboards that will support your decision making process and will work as an early warning signal if something goes wrong in the company.

Analysis in BSC Designer

Check out video manual for "Analysis."

Indicators from a business scorecard are a great source of information. KPIs, Dashboard, and Strategy Maps show you a picture of today's performance, but an analysis of historical data provides a lot of business insights as well.



With the "Analysis" tab in BSC Designer it is possible to find:

- Best/worth performing indicators over a period of time,
- Forecast indicator's value,
- Find the most important indicators, or
- Do a gain/loss analysis.

Each type of analysis has its own options, but there are some common elements of the interface as well:

- Below the list of indicators there are some controls that define the time scope of the analysis.
- On some tabs you will see such columns as "Progress," "Performance," "Weight," and "Value."
  - These are properties of an indicator in BSC Designer.
  - Their meaning was explained in the details in the "KPIs" section of the manual.

- In the indicators table there is an "Author" column.
  - In this column you will find the name of a scorecard owner,
  - Or the name of the person responsible for an indicator that was specified via "Initiatives."
  - This will help you to contact an appropriate member of your team if you find an indicator that needs more attention.

Let's review all of the types of analysis that BSC Designer provides.

"Performance / Progress" Analysis

If use this type of analysis, BSC Designer will calculate an average of the performance and the progress for all of the indicators.

- Use time controls at the bottom to customize the time period
- Click on the "Performance" and "Progress" columns to change the sorting order.

Use this type of analysis to find the top performing indicator, or the indicators that were underperforming over a period of time.

"Absolute weight" Analysis

As it was explained in the "KPIs" section of the manual, all indicators in BSC Designer have a "weight" property that shows the relevant importance of an indicator compared to another one. The ultimate importance of an indicator depends on its weight, and the weight of its parents.

On the "Absolute weight" tab you can find the indicators that have the biggest or smallest absolute weight. In this way you can find the indicators that impact your scorecard the most.

"Forecast" Analysis

On the "Time" chart for an indicator one can see a trend line that is a linear estimation of how the value of an indicator changes. The forecast analysis does a similar linear estimation for an indicator's value.

- Select any indicator from the list
- Enter a date in "Target date" field.
  - In "Forecast value" column BSC Designer will predict the value of the indicator for an entered date.

- Enter a value into the "Target value" field.
  - In the "Forecast date" column BSC Designer will predict the date when entered value is expected to be achieved.

"Value" Analysis

With this type of analysis you can have an overview of your indicators.

- Select an appropriate interval using the time controls.

The program will show:

- The minimum and maximum value of an indicator,
- The average value over the period, and
- The current value.

Use this type of analysis to check out the average indicator values for a period of time.

"Update time" Analysis

As it was discussed in the "KPIs" part of the manual, each indicator in BSC Designer can have its own update interval. One way to make sure that all of the indicators are updated on time is to use the "Alerts" tab, but sometimes it is necessary to have all of the update details in one place. Use "Update time" analysis for this purpose.

BSC Designer will list all of the indicators of your scorecard and display three columns with updated information:

- "Update in..." column shows when an indicator needs to be updated.
- "Last updated" column shows the date when an indicator was updated the last time.
- "Update each..." column summarizes information about a required update interval.

"Biggest gain/loss" Analysis

With this option one can easily find indicators that changed significantly. You can choose to look at the changes of indicators:

- Performance,
- Progress, or
- Value.

You can also choose if you want to compare the current value to the previous value or to some value in past.

The results are displayed in the "Gain/Loss" column. Click on the column to sort results from the biggest gain to the biggest loss and vice versa.

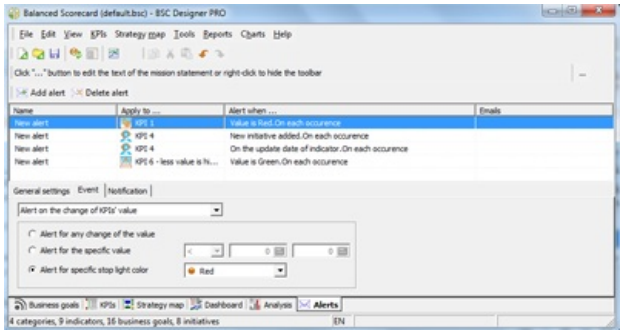
Conclusions

The "Analysis" tab in BSC Designer can give some really interesting business insights. You might find indicators that are underperforming, indicators that changed their value rapidly, predict trending to a red zone, or find indicators that were not updated on time. These findings will help your team to improve the ultimate performance of your business.

Alerts in BSC Designer

Check out video manual for Alerts.

Business scorecards help communicate strategy across the company. This communication works on a strategic level with the help of a strategy map, as well as on an operational level via metrics and initiatives. On the operational level it is important to learn on time about important changes. The "Alerts" tab in BSC Designer is helpful for this purpose.



With the "Alerts" function in BSC Designer you can sign up to receive notifications about:

- Indicators that were performing poorly or have got into the red zone,
- New initiatives added or,
- An approaching update deadline for an indicator.

Integration with BSC Designer Online

To have an "alerts" function working properly, you need to have an account in BSC Designer Online. The desktop version of BSC Designer connects to this account to obtain information about your team members and to send them out notification emails.

Creating a new alert

Let's pass through the steps needed to create a new alert or to modify an existing one.

- Go to the "Alerts" tab and click "Add alert" button. The settings available for the new alert will be displayed below.

On the "General settings" tab you can choose the name of a new alert and choose if you want this alert to be applied to the whole scorecard project or to the specific indicator only.

On the "Event" tab you can select the reason to generate an alert. Three options are available here:

- "**Alert on the change of KPIs' value**" option allows monitoring the value of an indicator. You can choose to have:
  - A notification about any change of indicator's value;
  - A notification about the value of an indicator in the specific interval, or
  - A notification when the indicator's stop light becomes red.
- An option "**Alert on new initiative added**" can be used to notify all of the members of your team

about a new initiative that was aligned with an indicator. Learn more about various types of initiatives in the respective section of the manual.
- The "**Update interval alert**" can be generated when an indicator's update deadline is approaching or was missed. It is useful to monitor the state of all indicators to make sure that all of the values are up to date.
- On the "**Notification**" tab you can select those members of your team who will receive an alert.
  - You can choose if you want BSC Designer to send a notification right away or wait for some time and aggregate several events into a single message.

For example:
- A manager can have weekly aggregated reports with important notifications about indicators in the red zone and indicators that were not updated on schedule.
- Line-level employees could also receive immediate notifications about new initiatives, tasks and feedbacks that were aligned with an indicator.

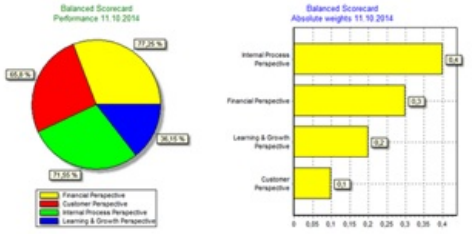
For a business scorecard project you can have as many alerts as needed that will keep your team informed in different ways. The result of using those alerts is that you will be addressing all of the problems proactively, thus preventing big business performance issues. You will never again face a situation that some indicator was not updated for months, or that an indicator in a red zone was not attended to properly.

Reports in BSC Designer

Check out video manual for "Reports"

When strategy **description** is accomplished, strategy **execution** just begins. The members of your team might need to discuss a strategy in the conference room, report the progress using specific indicators, or work according to the action plan.

Sometimes, you might need to get a certain *projection* of your business scorecard from BSC Designer and share it with others. Let's check the "Reports" menu to learn more.



Data for Balanced Scorecard

Date	Performance	Baseline	Progress	Target
04.10.2014	55,89 %	6,85 %	60,03 %	85,34 %
05.10.2014	55,89 %	6,85 %	60,03 %	85,34 %
06.10.2014	59,33 %	6,85 %	64,32 %	85,34 %
07.10.2014	58,16 %	6,85 %	62,46 %	85,34 %
08.10.2014	77,09 %	6,85 %	86,00 %	85,34 %
09.10.2014	68,44 %	6,85 %	75,59 %	85,34 %
10.10.2014	67,32 %	6,85 %	74,11 %	85,34 %
11.10.2014	65,61 %	6,85 %	72,25 %	85,34 %

Export to HTML

HTML report is the most popular way to present data from the scorecard project. This report focuses on KPIs, their data, initiatives, and charts.

- When generating a report you can choose the required level of the details: from a short summary to a report with all of the initiatives, and data tables.

Also, BSC Designer suggests you to choose a data grouping method: you can have a report with all of the data; or you can choose to present a quarterly or yearly summary for the available data.

Columns in the report

Any report has a table with a number of columns. Although the look of these tables might be different, the meaning of the columns is always the same.

When you generate the report you select an interval for the report:

- ***Start*** and ***End*** (value/performance/progress) are your value/performance/progress for the first time point in the interval and for the last time point in the interval respectively.
- Dynamic is the difference between End value and Start value.
- Max, Min, Average are respectively maximum, minimum or average performance/progress over the reporting period.

BSC Designer also takes into account a time point currently selected in the program's calendar. Column "**Current**" contains the value for the currently selected date (it can be today's date or any other selected date).

KPI Report

In the "KPI Report" menu you will find several reports that can tell different stories about the Indicators from your project:

- **KPI Structure Report** will present the indicators as you see them on the KPIs tab without data tables.
- **Values Report,** in the contrast, contains all of the data and performance stoplights.
- **Key Risk Indicators Report** summarizes the estimation of the risk impact and probability over your scorecard taking into account risk indicators available in the project.
- **Data Series Report** will show the underlying details for those indicators that use data series as a source of data.

Business Goals Report

Business goals report focuses on the "objectives" part of your business scorecard. For this report you can choose the desired level of the details:

- Select if you want to have a strategy map in the report;
- Choose what initiatives you want to have: all of them, or only those that were added recently.

Strategy Map Report

In the Strategy Map Report menu you will find several options:

- You can create an HTML report with maps that already exist in your project, or
- Create a report with all of the maps that can be generated automatically.

BSC Designer can create reports with:

- Classical Balanced Scorecard Strategy Map,
- Overview map with top level goals and indicators, and
- Cascading strategy map to show the connections between scorecards.

Dashboard Report

On the Dashboard tab in BSC Designer you have different views on the business performance. If you need to share these dashboards with your team you don't need to make a screenshot and save it to a picture file - using Dashboard report you can have a copy of your dashboards in HTML or PDF formats.

Initiatives Report

In BSC Designer there are two types of initiatives, respectively two types of reports:

- There are text initiatives like comments, remarks, and links to the documents. In this case the report will include the list of these initiatives and their details.
- There are also initiatives like budget and duration. In this case BSC Designer calculates the total budget and total time needed to execute the strategy that was described in the business scorecard.

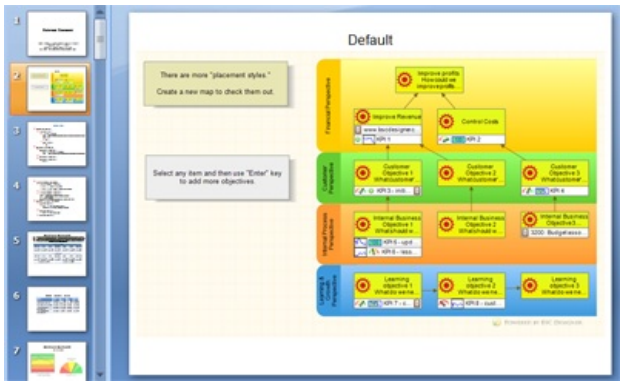
MS Excel Report

Sometimes you might not want to educate all of the members of your team to use BSC Designer; still you want them to have an access to the KPI scorecard. In this case an MS Excel report might be a good option. Actually, it is not a report, but a live copy of your KPI scorecard with all of your data and calculations. One can change some values in the spreadsheet and the performance figures will be updated automatically.

MS PowerPoint Report

PowerPoint presentation is a classical format to support a strategy discussion. The benefit is that you can support your ideas by some key data from your business scorecard. Here is what a PowerPoint report offers:

- On the first slide you will see an introduction of your Business Scorecard;
- On the next slides will be placed the maps from your project;
- Then you will see the business goals;
- Finally, the presentation will include all the details about indicators together with some key charts.



Customizing report

There are different ways to customize your reports in BSC Designer. One of the typical cases is that you need *to comment* on some charts. To do this just add a new comment or a new remark via Initiatives and use one of the chart tags. Your comment will appear under the selected chart in the reports. Learn more about comments.

Need to customize your reports more?

- Start with the "Settings" button that is available for some reports;
- If you need to add to the template company's logo or other data, go to the Company Info tab in application options;
- If you want to customize the way the charts look, go to the Chart colors tab in application options.

Sharing the report

Excel or PowerPoint reports are created directly in MS Office, so you can easily save and share them with your team. With HTML-based reports you have even more flexibility:

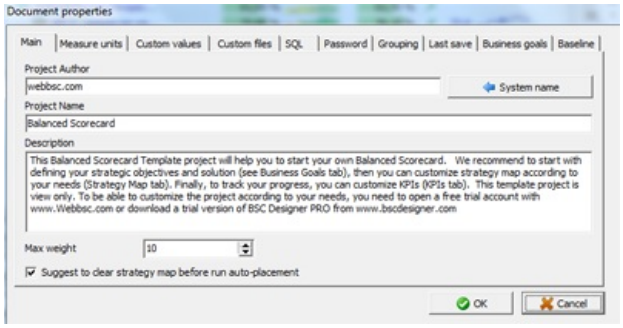
- You can **save** a report to the local disk
- You can **publish it** on your FTP server and share the link with your team
- You can **print** the report directly from BSC Designer

If you need to have a PDF version of the report, then use of one the PDF printers pre-installed in Windows or download and install a free one. In this way you will be able to save any report in PDF format.

Reports in BSC Designer is a great way to share some important information from your Business Scorecard with all stakeholders. Download a trial copy of BSC Designer and try the reports with your own data!

BSC Project Properties

To access Balanced Scorecard Project Properties, use the Properties command in the File menu.


Document properties
Main
Measure units
Custom values
Custom files
SQL
Password
Grouping
Last save
Business goals
Baseline
Project Author
webbsc.com
System name
Project Name
Balanced Scorecard
Description
This Balanced Scorecard Template project will help you to start your own Balanced Scorecard. We recommend to start with defining your strategic objectives and solution (see Business Goals tab), then you can customize strategy map according to your needs (Strategy Map tab). Finally, to track your progress, you can customize KPIs (KPIs tab). This template project is view only. To be able to customize the project according to your needs, you need to open a free trial account with www.Webbsc.com or download a trial version of BSC Designer PRO from www.bscdesigner.com
Max weight
10
Suggest to clear strategy map before run auto-placement
OK
Cancel

The Main tab contains information about the balanced scorecard:

- Scorecard author
- Scorecard name
- Scorecard description
- Max weight

The Measure Units tab contains information about the units of measure used in the scorecard:

- Measure units can be added or deleted;
- Measure units can be imported from another .bsc project.

Custom values & files tabs

These two tabs help to customize reports:

- Using custom values, if it is needed to insert text in the report;
- Using custom files, if it is necessary to add some files to the report.

The custom values tab allows specifying custom values which will be used in the HTML report. To create a new custom value, follow these steps:

1. Modify the template file to your needs. Typically you need to modify the "Common.html" file located in the \Templates folder.
2. In the template file, use something of the format %custom_value%
3. Go to the "Custom values" tab and click the Add button.
4. In the Template field, input the name of the "custom_value" (without quotation marks).
5. In the Value field, input the value for the custom template.
6. Click the Apply button.

Check the online manual on customizing reports.

Custom files use the same idea as Custom values (see above), but custom files are designed specifically for files, for instance, a customer logo.

- When an HTML report is generated, the custom file will be copied to the report folder.

Check the online manual on customizing reports.

SQL tab

- The SQL tab contains settings that are used when BSC Designer access the external data with SQL indicators.

Password tab

- Use text fields on the *Password* tab to assign password for reading and writing.

Grouping tab

This tab defines grouping settings used in BSC Designer.

Last save tab

Displays latest saved sessions for the current project.

Business goals tab

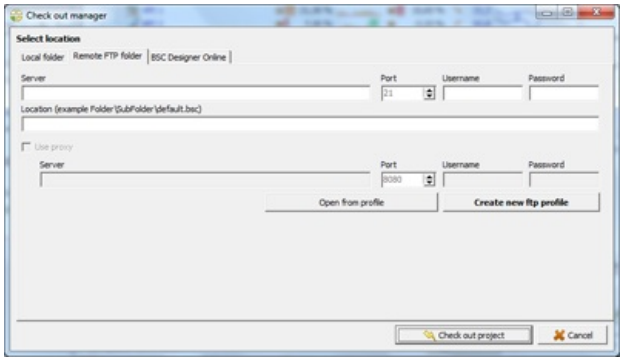
On this tab one can choose if/how BSC Designer fills in empty business goals descriptions.

Baseline

On this tab it is possible to define how baseline is updated in BSC Designer.

Check-In/Check-Out Business Scorecard Project

BSC Designer can check out a project to a remote **FTP server** or **an account in BSC Designer Online** and later check in the project to make modifications in the future.



- Use the "Check in project" command in the File menu to access a project on a remote server.
- Use the "Check out project" command in the File menu to save a local project to an FTP server and account in BSC Designer Online.

Access remote projects

Storing projects on FTP or in BSC Designer Online is necessary when you want to build a Balanced Scorecard cascade by linking several scorecards together. Using an Imported Indicator, BSC Designer users can access projects stored remotely.

Command Line Interface

A command line interface is available in BSC Designer. Using the command line interface, you can generate Excel reports in silent mode. This is very useful when you need to integrate BSC Designer with another business application.

The interface for the command line is: [Filename] [-export FileName] [-overwrite]

For example, if you need to export the file "Scorecard1.bsc" into Excel file "Report.xls," you should use the following parameters when launching BSC Designer from a third-party tool:

- "Scorecard1.bsc" -export "Report.xls" -overwrite

When using long paths to the files, be sure to use quotation marks, as in "C:\program files\BSC Designer\..."

Time points in reports

BSC Designer supports time points. If you are using time points and need to get a report for a certain date, use the "-date" parameter + date as it is according to your current computer settings, for instance:

- "Scorecard1.bsc" -export "Report.xls" -overwrite -date 01.24.2007
- *Please note:* the date must be according to your current computer settings (it might be DD.MM.YYYY or MM.DD.YYYY, depending on your configuration)

HTML report via command line

It is possible to generate HTML reports through the command line interface. For that function you should specify the starting and ending date for the report and add the -html option in the command line

- Example: bsc_designer.exe some_project.bsc -date1 20.12.2007 -date2 02.01.2008 -html -export report.html -overwrite

Other reports:

- the -overview option in a report will enable generation of overview reports, for example: bsc_designer.exe some_project.bsc -html -export report.html -overwrite -overview
- the -powerpoint option will generate a report in PowerPoint presentation (.ppt) format, for example: bsc_designer.exe some_project.bsc -powerpoint -export report.ppt -overwrite

Exporting strategy maps

BSC Designer supports strategy maps. The strategy map can be exported using BSC Designer's interface or the command line:

Command line syntax:

- bsc_designer.exe BSCFileName -export PictureFileName -StrategyMap [-StrategyMapPlacement <SnowFlake|HTree|Tree|Classical|Cascading|Table|Cyclical|Strategic>] [-StrategyMapLevel

<MaxLevel>]

- bsc_designer.exe BSCFileName -export REPORTFILE -allmaps

Sample: export of an existing map.

- bsc_designer.exe some_project.bsc -export "C:\resulted_file.jpg" -StrategyMap

Sample: export of a map as a snowflake.

- bsc_designer.exe some_project.bsc -export "C:\resulted_file.jpg" -StrategyMap -StrategyMapPlacement SnowFlake -StrategyMapLevel 1

Sample: create a report that includes all supported strategy maps

- bsc_designer.exe some_project.bsc -export C:\report.html -allmaps

Common Product Questions

Find here general questions and answers about BSC Designer

How to download BSC Designer

Please visit http://www.bscdesigner.com/download-balanced-scorecard-software and download the latest version of BSC Designer.

How to update BSC Designer

Use "Update to latest version" command in the Help menu.

How to uninstall BSC Designer

Select "BSC Designer" in the Start -> Programs submenu and select "Uninstall BSC Designer"

How to backup BSC Designer settings

All information about BSC Designer settings is in the Windows registry. The registry key is: HKEY_CURRENT_USER\Software\AKS-Labs\BSC Designer. If you want to make a backup of your system, including BSC Designer's settings, please use your favorite registry backup utility.

How to buy BSC Designer

Please go to the BSC Designer ordering page: http://www.bscdesigner.com/buy-balanced-scorecard-software and check available licenses and pricing options.

Is it a one-time payment?

Yes, your license is not limited in time, but optional updated are free only during 1 year.

How to enter registration code

You should copy and paste the registration code into the registration box in BSC Designer.

1. Launch BSC Designer and go to the Help menu.
2. Select "Enter registration code".
3. Copy and paste the registration code and click OK.

How to recover registration code

Please use the key code recovery form.

How to contact customer support

Since solving problems involves the exchange of technical details, the best way to contact BSC Designer Customer Service is by using the web support form:

- http://www.bscdesigner.com/support